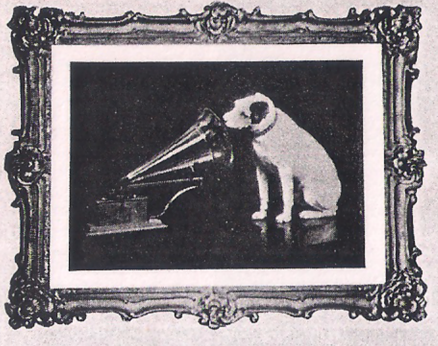
ELECTRIC & MUSICAL INDUSTRIES LTD
HAYES, ENGLAND
(E.M.I.)

Electric & Musical Industries Ltd is known throughout the world as EMI, one of the large industrial groups in Great Britain.

The Group's interests are considerably diversified. It has established an outstanding reputation in the general field of Electronic Science, where it has made many invaluable contributions to vital defence and industrial developments. The Group has extensive Research and Manufacturing plant at its headquarters at Hayes, near London, and subsidiary factories in many parts of the world.

It is also deeply involved in the entertainment industry, which interests it has recently enlarged by the acquisition of The Grade Organisation Limited. Its main strength in this area however continues to be in gramophone records, where it remains the greatest organisation in the world.

Brief notes appear at the end of this book relating to 'Other activities of the Group'. It is to the Gramophone Record industry, however, that this book is specifically devoted. It is intended primarily for distribution amongst people concerned with the Record industry and it is hoped that it will prove of interest and of value to them.



REGD. TRADE MARK OF
THE GRAMOPHONE CO. LTD.
—ONE OF THE EMI GROUP OF COMPANIES

REGD. TRADE MARK OF
THE GRAMOPHONE CO. LTD.
—ONE OF THE EMI GROUP OF COMPANIES

Important! A word of explanation

This explanation is essential to understanding world record markets, particularly for our readers in the United States.

You will find the EMI Companies using (and owning) the trademark "His Master's Voice" with the terrier dog, in almost every country of the world except North and South America and Japan. The same is true of the trademark *"Columbia"* with the musical notes.

Interesting, isn't it? Actually, an EMI Group Company created "His Master's Voice" as a trademark in 1899. The picture which became the trademark was painted by Francis Barraud, a British artist, and the original hangs in the Board Room in EMI House, London. In the United States the then infant Victor Talking Machine Company adopted the trademark. It is used today (and owned) by the RCA Victor Division of Radio Corporation of America in North and South America and by the Nippon Victor Company in Japan.

The situation is somewhat similar with the Columbia trademark. An EMI Group Company owns it today almost everywhere except in North and South America and Japan. During the 1930s, it was sold, for use in North and South America and is now used in America by the vast organization known as the Columbia Broadcasting System, and in Japan by the Nippon Columbia Company.

EMI is the first to agree that the HMV dog has a good home with RCA, U.S.A. . . . and "Columbia" with CBS. This explanation is not to deprecate these fine organizations nor the proprietors in Japan but merely for clarification so that you won't be confused when you see, in Athens for example, an organization called "Columbia Graphophone Co. of Greece, Ltd." *owned by EMI.* There are similar situations in many parts of the world.

In the U.S.A. EMI's company is Capitol Records, Inc., known throughout the world by its own trademark and label.

The *oldest* record trademark, as far as we can determine, is EMI's own "Recording Angel," created in 1898, which is famous today as the premiere classical label—ANGEL—in the U.S.A.

WHY this book?

A single volume of useful facts about selling gramophone records around the world is a rarity . . . perhaps because there are few authorities in a position to present such a global picture.

E.M.I., the world's largest recording organization, with major companies in every corner of the earth, has available the facts and figures to produce such a comprehensive report; one of value to anyone interested in music, professionally or commercially. Hundreds of record executives from E.M.I. companies around the world joined in gathering this information about the areas they know best, the business they know best . . . for the record market, and this book, is truly a global affair.

E.M.I. invites you on this trip through the intriguing world of records; never before, to our knowledge, described in one volume. It is factual, readable and, we hope, helpful.

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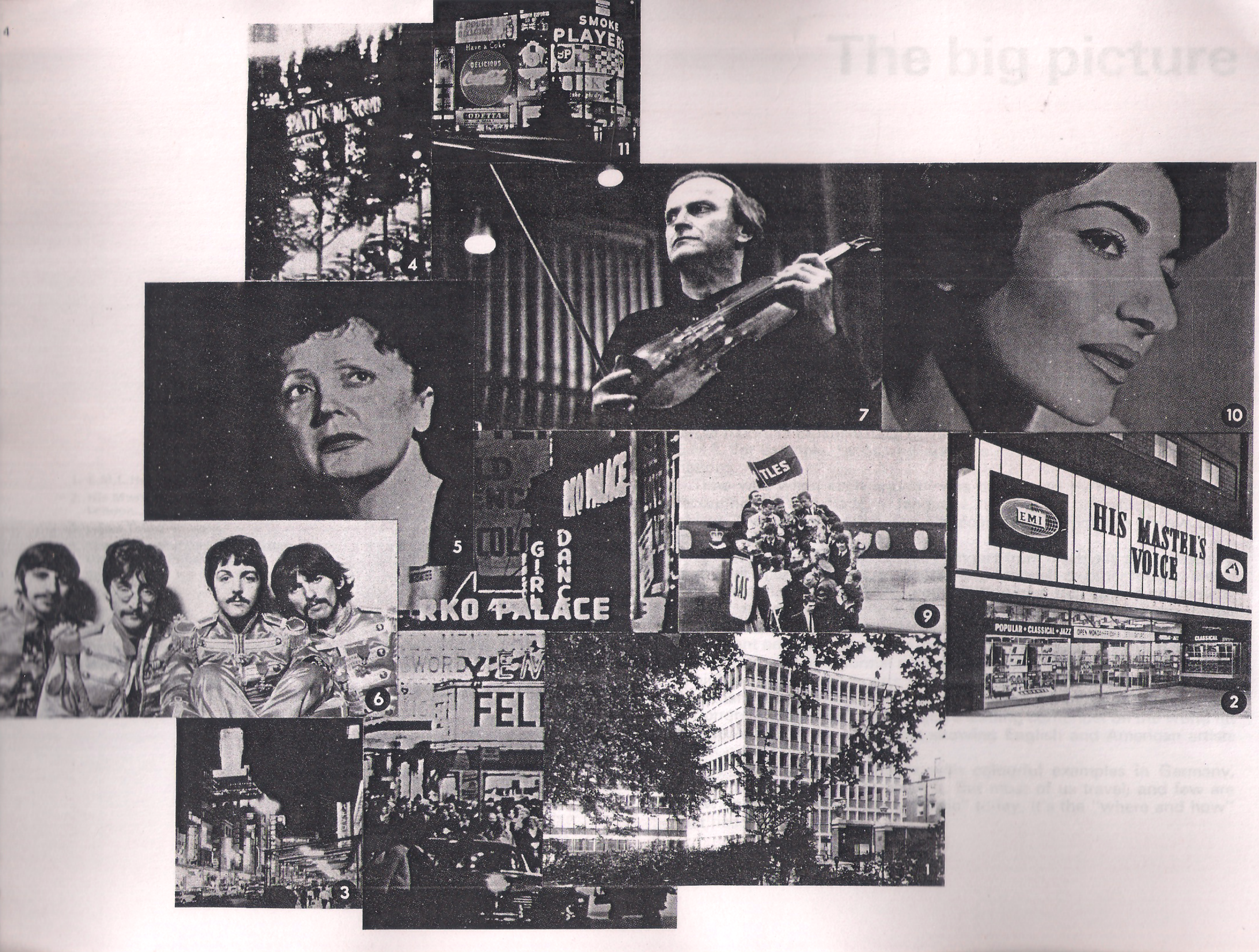
Electric & Musical Industries Ltd. Hayes, Middlesex, England.


SMOKE
PLAYERS
Have a Coke
DELICIOUS
ODETTA
RKO PALACE
GIRL
DANC
FEL
EMI
HIS MASTER'S VOICE
POPULAR • CLASSICAL • JAZZ
CLASSICAL
SAS

The big picture

1. **E.M.I. House, Manchester Square, London.**
2. **His Master's Voice, Oxford Street Store, London.**
3. **Ginza Tokyo at night.**
4. **The Pathé-Marconi Retail Store, the Champs Elysées, Paris.**
5. **Edith Piaf.**
6. **The Beatles.**
7. **Yehudi Menuhin.**
8. **Times Square, New York.**
9. **The Beatles arriving at Copenhagen.**
10. **Maria Callas.**
11. **Piccadilly Circus, London.**

The worldwide record market adds up to nearly *a thousand million records* representing over 40,000 years of continuous playing time! Knowing where these buyers are, their changing tastes, and how to serve and sell them is the business of recording industry experts, specializing in international marketing.

The United States, for example, is a giant market. Yet, those who concentrate efforts within its borders may be bypassing nearly 50% of potential worldwide sales. Europe takes a big share—over 30%. That's why the larger record companies must control companies in all parts of the globe. E.M.I., for example, owns and operates major record companies in 28 nations.

Time was when each country was dominated by its own domestic recordings . . . as a matter of language, taste, pride, or perhaps just availability. The only exception was classical music, which has always been international.

Today, as we all know, cowboy singers from Nashville are concerned over their chart showings in South Africa as well as other remote areas. And teenage groups rock the world, with a beat that knows no barriers.

India, mysterious and far off to westerners for decades, is no longer remote. At Shelly's Manne-Hole, in Hollywood, a strange guitar-like instrument entrances a packed-in Saturday afternoon crowd. It's Indian Ravi Shankar in an informal recital on the sitar. Today music from India is high on the list of imports to the United States and other countries. And there is a growing acceptance for "western" music in India.

Currently, Australia has produced a leading contender on the world hit parade, while at the same time showing English and American artists high on their polls.

One could go on for pages with colourful examples in Germany, Japan, France, Italy—you name it. But most of us travel, and few are unaware of the "one world of music" today. It's the "where and how" that needs spotlighting.

MAKING & MARKETING RECORDS IN EVERY CORNER OF THE EARTH

UNITED STATES

HOLLYWOOD, CALIFORNIA
CAPITOL RECORDS INC.,
The Capitol Tower,
Hollywood,
California 90028.
Phone: (213) HO 2-6252
Cables: Caprecords, Hollywood

CENTRAL AMERICA

MANAGUA
NICARAGUA
EMI Licensee and Manufacturing Associate

URUGUAY

MONTEVIDEO
EMI Licensee and Manufacturing Associate

WEST INDIES

KINGSTON, JAMAICA AND
ST. THOMAS, BARBADOS
EMI Licensee and Manufacturing Associate

VENEZUELA

CARACAS
EMI licensee and Manufacturing Associate

BRAZIL

RIO DE JANEIRO
INDÚSTRIAS ELÉTRICAS
E MUSICAIS FÁBRICA ODEON S.A.,
Rua Evaristo da Veiga, 20-1° andar,
Rio de Janeiro.
Phone: Rio de Janeiro 22-9887
Cables: Turntable Rio de Janeiro

PERU

LIMA
EMI Licensee and Manufacturing Associate

CANADA

MALTON, ONT.
CAPITOL RECORDS (CANADA) LTD.,
3109 American Drive,
Malton,
Ontario.
Phone: Malton 677-5050
Cable: Capitolrec Malton, Ontario

MEXICO

MEXICO CITY
DISCOS CAPITOL DE MEXICO, S.A
Ayuntamiento 54,
Mexico 1, D.F.
Phone: Mexico 18-13-20
Cables: Caprecords, Mexico

COLOMBIA

MEDELLIN
EMI Licensee and Manufacturing Associate

ECUADOR

GUAYAQUIL
EMI Licensee and Manufacturing Associate

BOLIVIA

LA PAZ
EMI Licensee and Manufacturing Associate

CHILE

SANTIAGO
INDUSTRIAS ELECTRICAS
Y MUSICALES ODEON S.A.,
Compania 2045,
Santiago.
Phone: Santiago 85565, 84574, 87981
Cables: Turntable Santiago

REPUBLIC OF THE CONGO

KINSHASA
EMI Licensee and Manufacturing Associate

EAST AFRICA

NAIROBI
ELECTRIC & MUSICAL
INDUSTRIES LTD.
107 St. George's House,
Parliament Road,
Nairobi,
Kenya.
Phone: Nairobi 25575
Cables: Emitron Nairobi

UNITED KINGDOM

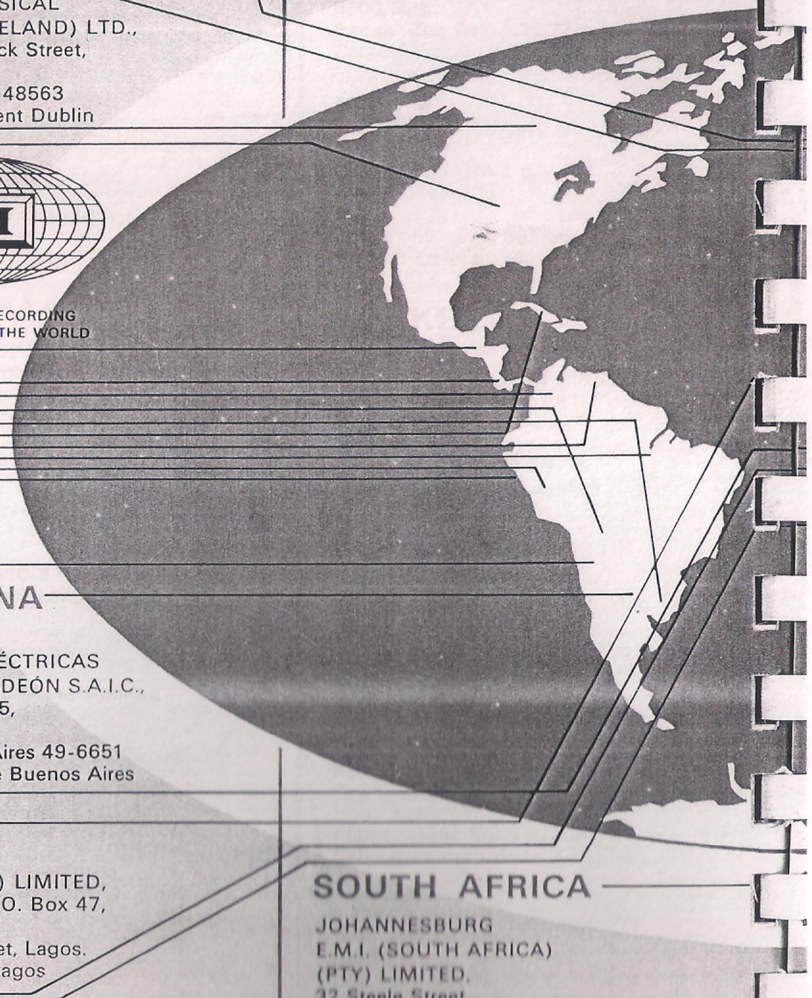
LONDON
EMI RECORDS
(The Gramophone Company Ltd.)
EMI House,
20 Manchester Square,
London, W.1.
Phone: 01-486 4488
Cables: Emirecord, London

EIRE

DUBLIN
ELECTRIC & MUSICAL
INDUSTRIES (IRELAND) LTD.,
23 Lower Dominick Street,
Dublin 1.
Phone: 46108/9, 48563
Cables: Jabberment Dublin

EMI

THE GREATEST RECORDING ORGANISATION IN THE WORLD



ARGENTINA

BUENOS AIRES
INDUSTRIAS ELÉCTRICAS
Y MUSICALES ODEÓN S.A.I.C.,
Av. Corrientes 485,
Buenos Aires.
Phone: Buenos Aires 49-6651
Cables: Turntable Buenos Aires

NIGERIA

APAPA
E.M.I. (NIGERIA) LIMITED,
7 Wharf Road, P.O. Box 47,
Apapa.
9 Breadfruit Street, Lagos.
Cables: Eminig Lagos

RHODESIA

BULAWAYO
EMI Licensee and Manufacturing Associate

BELGIUM

BRUSSELS
S.A. GRAMOPHONE N.V.,
171 Boulevard Maurice Lemonnier,
Brussels.
Phone: Brussels 12.98.15.
Cables: Gramophone Brussels

FRANCE

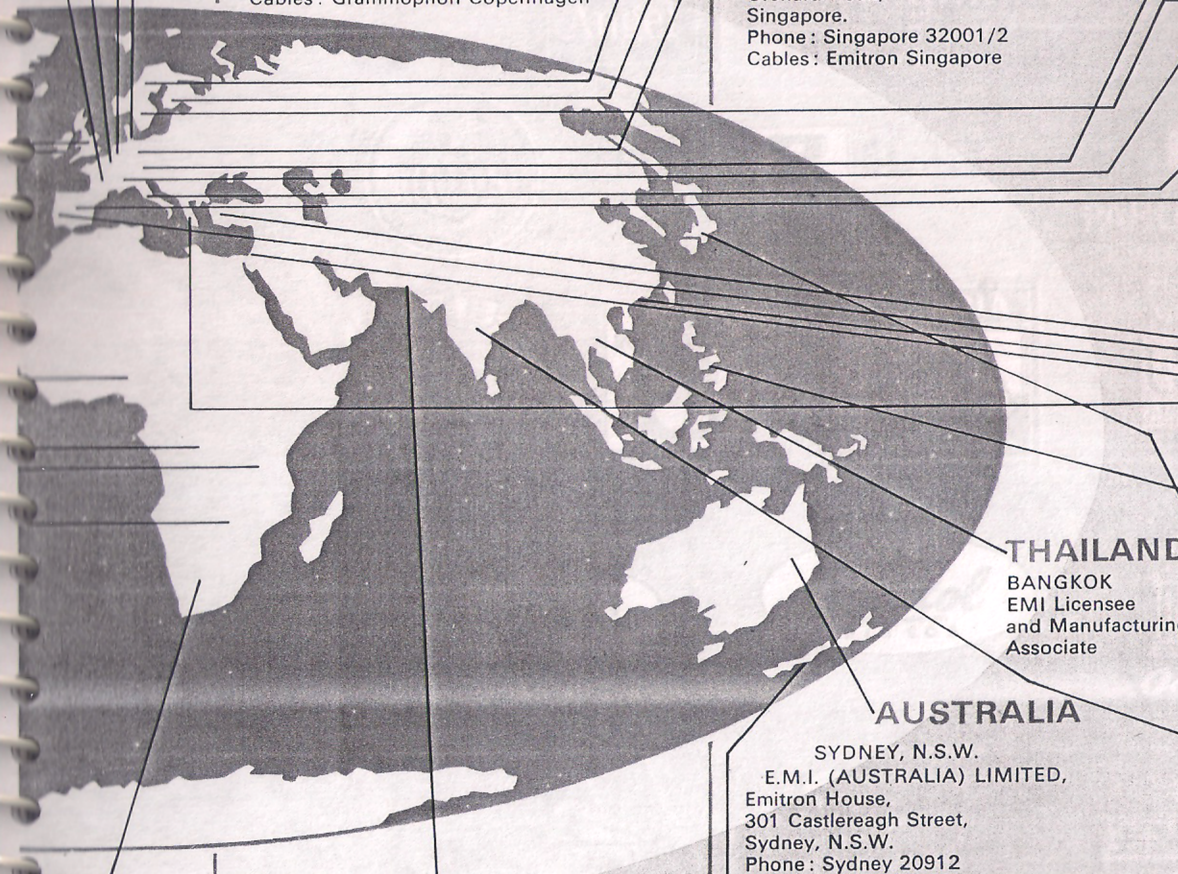
PARIS
LES INDUSTRIES MUSICALES
ET ÉLECTRIQUES PATHÉ-MARCONI,
19 Rue Lord Byron,
Paris 8e
Phone: Balzac 53-00
Cables: Gramophone Paris

SOUTH AFRICA

JOHANNESBURG
E.M.I. (SOUTH AFRICA)
(PTY) LIMITED,
32 Steele Street,
Steeledale,
Johannesburg.
Phone: Johannesburg
869-2661/2/3/4/5/6/7
Cables: Soundbox Johannesburg

HOLLAND
HEEMSTEDE
N.V. VERKOOP-MAATSCHAPPIJ
"BOVEMA",
Gramophone House,
Bronsteeweg 49,
Heemstede.
Phone: Haarlem 80750
Cables: Bovema Heemstede

DENMARK
COPENHAGEN
ELECTRIC & MUSICAL INDUSTRIES
(DANSK-ENGELSK) A/S,
Høffdingsvej 18, Copenhagen-Valby.
Phone: Copenhagen 30 67 11
Cables: Grammophon Copenhagen



PAKISTAN
KARACHI
THE GRAMOPHONE COMPANY OF
PAKISTAN LIMITED,
C/28 Estate Avenue,
Mauripur,
Karachi 13.
Phone: Karachi 79566-79149
Cables: Jabberment Karachi

NORWAY
OSLO
EMI Licensee and Manufacturing
Associate

FINLAND
HELSINKI
EMI Licensee and Manufacturing
Associate

SINGAPORE/MALAYSIA
SINGAPORE
EMI RECORDS
(SOUTH EAST ASIA) LTD.,
4th Floor, Macdonald House,
Orchard Road,
Singapore.
Phone: Singapore 32001/2
Cables: Emitron Singapore

THAILAND
BANGKOK
EMI Licensee
and Manufacturing
Associate

AUSTRALIA
SYDNEY, N.S.W.
E.M.I. (AUSTRALIA) LIMITED,
Emitron House,
301 Castlereagh Street,
Sydney, N.S.W.
Phone: Sydney 20912
Cables: Emitron Sydney

NEW ZEALAND
WELLINGTON
HIS MASTER'S VOICE (N.Z.) LIMITED,
162-172 Wakefield Street,
Wellington C.I.,
Phone: Wellington 50-815
Cables: Gramophone Wellington

GERMANY
COLOGNE
ELECTROLA GESELLSCHAFT m.b.H.,
Maarweg 149,
Cologne-Braunsfeld,
Phone: Cologne 49.31.31
Cables: Electrolaton Cologne

AUSTRIA
VIENNA
OESTERREICHISCHE COLUMBIA
GRAPHOPHON G.m.b.H.,
Furichgasse 2,
Vienna 1.
Phone: Vienna 52 36 75/77
Cables: Colpho Vienna

YUGOSLAVIA
ZAGREB
EMI Licensee and Manufacturing
Associate

SPAIN
BARCELONA
COMPAÑIA DEL GRAMÓFONO-ODEÓN
S.A.E.,
Urgel 234,
Barcelona (11).
Phone: Barcelona 230-22-05
Cables: Gramofono Barcelona

GREECE
ATHENS
COLUMBIA GRAPHOPHONE COMPANY
OF GREECE LIMITED,
127 Heracliou Street,
Rizopolis,
T.909, Athens.
Phone: Athens 880-371
Cables: Colgraph Athens

JAPAN
TOKYO
EMI Licensee and Manufacturing
Associate

INDIA
CALCUTTA
THE GRAMOPHONE COMPANY
OF INDIA (PRIVATE) LIMITED,
33 Jessore Road,
Dum Dum,
Calcutta 1.
Phone: Calcutta 57-2431/33 and
57-4163/65
Cables: Emitron Calcutta

PHILIPPINES
CALOOCAN CITY
EMI Licensee and Manufacturing
Associate

SWEDEN
STOCKHOLM
ELECTRIC & MUSICAL INDUSTRIES
LIMITED SVENSKA A.B.,
Sandhamnsgatan 39,
Stockholm 27.
Phone: Stockholm 22 45 80
Cables: Grammophon Stockholm

SWITZERLAND
ZUG
EMIAG VERKAUFS-A.G.
DER ELECTRIC & MUSICAL
INDUSTRIES LIMITED,
Bahnhofstr 28,
6300, Zug.
Phone: Zug 042/4.20.22
Cables: Emispher Zug

ITALY
MILAN
E.M.I. ITALIANA S.p.a.
Piazza Cavour 1,
Milan.
Phone: 652 577, 652 668
Cables: Emigram Milan

TURKEY
ISTANBUL
GRAMOFON LIMITET SIRKETI,
Halkali Caddesi 85,
Yesilköy,
Istanbul.
Phone: Yesilköy 73-89-76
Cables: Gramotürk Istanbul

PORTUGAL
LISBON
EMI Licensee and Manufacturing
Associate

HONG KONG
ELECTRIC & MUSICAL INDUSTRIES
(HONG KONG) LTD.,
308 The Chartered Bank Building,
Des Voeux Road Central,
Hong Kong.
Phone: Hong Kong 223081/2
Cables: Emitron Hong Kong

LEBANON
BEIRUT
EMI (LEBANON) S.A.L.,
Immeuble César Eliane,
Mékallés
Beirut.
Phone: Beirut 280013
Cables: Emibanon Beirut

EMI

HIS MASTER'S VOICE

LA VOIX DE SON MAITRE
LA VOCE DEL PADRONE
LA VOZ DE SU AMO

Angel

Columbia

Capitol

FDS
FULL DIMENSIONAL SOUND

STUDIO 2 STEREO

PARLOPHONE

WAVERLEY

百代唱片
Pathé

tower

ELECTROLA
Die Stimme seines Herrn

МЕЛОДИЯ
USSR
MELODIYA ANGEL
Newly Recorded in the USSR

Stateside

PROBE
sound where there has been silence

REGAL

Capitol
MARCA REGISTRADA
DISCOS

Odeon

REGAL
ZONOPHONE

高亭
ODEON

ENCORE!

Pathé

EMI

SERAPHIM
Angels of the highest order

The trade mark—His Master's Voice—has probably captured the imagination of people throughout the world more than any other trade mark: it has been reproduced in countless cartoons. The words themselves have been freely borrowed in innumerable editorials.

The above picture, based on the famous dog trade mark, is of great historical interest, as it was taken at McMurdo Sound in January 1911 with one of Captain Scott's sledge dogs listening to an His Master's Voice gramophone of the period.

Trade Marks

Since the earliest days of the record industry trade marks have been important because they have been accepted as a measure of the standard of quality.

During the growth of the industry in various parts of the world different trade marks have emerged in different countries as leaders in the field.

EMI enjoy the use of an outstanding share of the world's most famous record trade marks. A selection of these is illustrated on the opposite page.

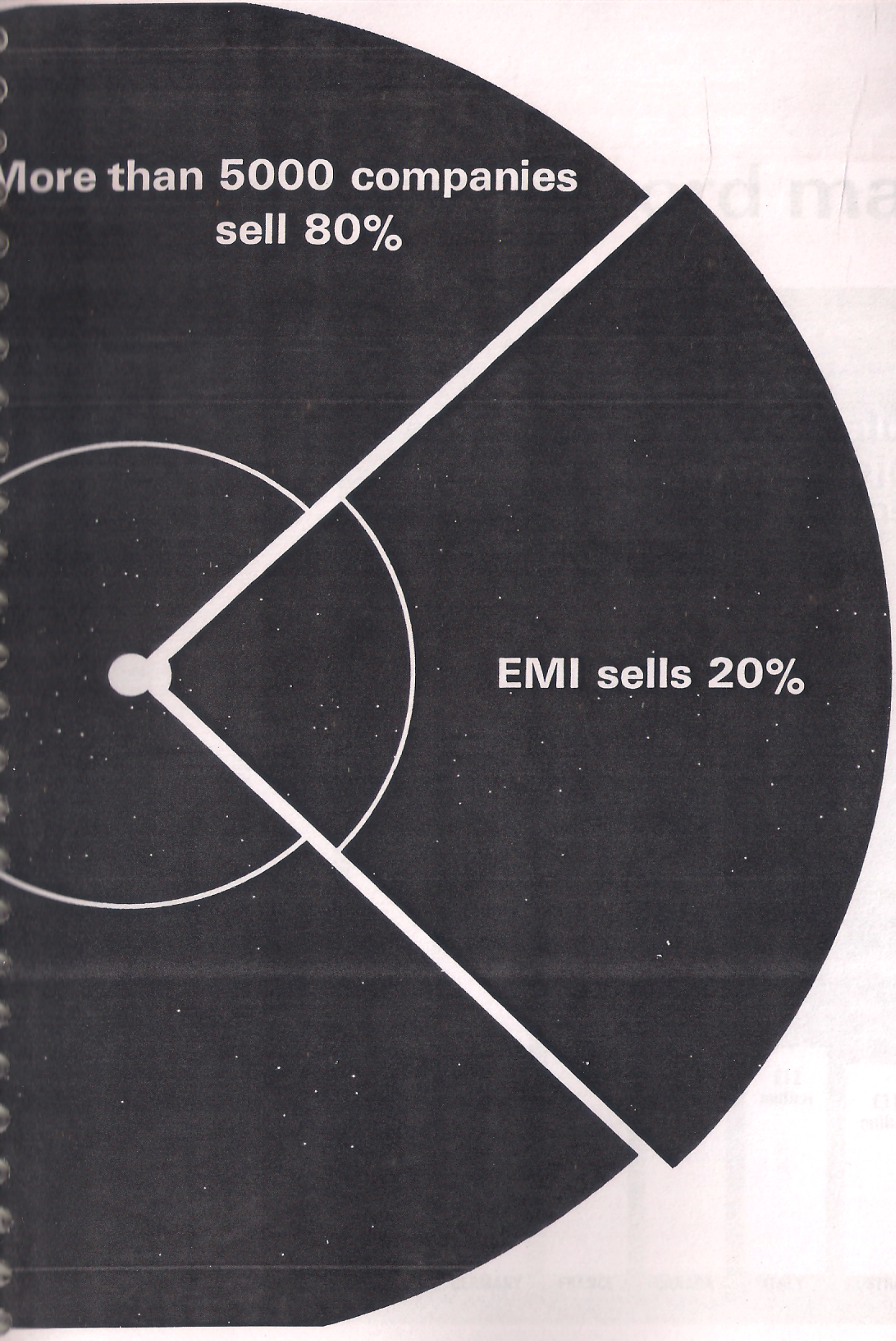
A global boom in records

On the following pages you will find reproduced charts showing shares of the world record market in each country. It's significant, of course, but should not distort one's perspective. For a small segment on a chart can indicate an important and growing market that must be included in all global planning.

In Sweden, for example, the EMI company doubled its business every year the last five years. Spain, in the same period, has nearly tripled its record business. In Brazil, each year an additional 70,000 record players are sold, with record sales rising almost 50% in the last two years.

In Chile, where EMI's label Odeon represents over half of all record sales, 26,000 new customers buy record players each year.

Elsewhere, German homes are buying 1,500,000 phonographs a year. France 600,000. Mexico 75,000. Denmark 70,000. Belgium 120,000. Australia 128,000. And onward and upward go record sales *everywhere.*



It's a big world...

NEARLY A THOUSAND MILLION RECORDS SOLD ANNUALLY

530 MILLION SINGLE RECORDS

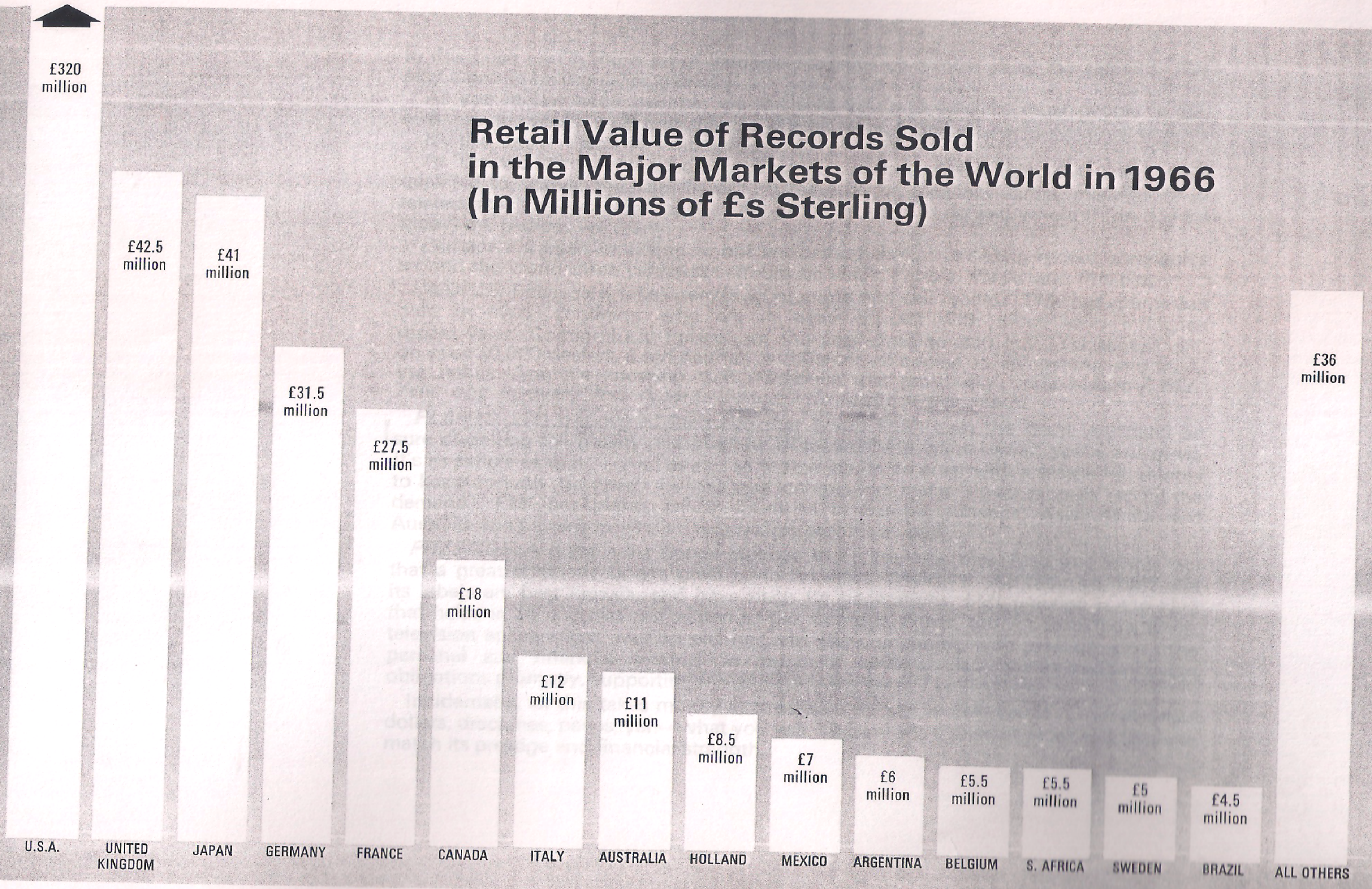
390 MILLION L.P. RECORDS

5000 RECORD PRESSES

60,000 RECORD DEALERS

OVER 10,000 RADIO STATIONS (PLAYING RECORDS)

and a big record market



Selling the world market...

In this book you'll find a lot of valuable statistics on almost all of the elements that play a part in record sales, globally.

As you review each country, we are sure you will react as most people in our business do: you'll want your share, and a bit more, from every area, however remote.

It's the "how" that slows most of us up.

As the world's largest record organization with 29,000 employees, E.M.I. feels qualified to answer this. But as a participant in the business—artist, manager or in related activities—*you* will be the final judge of what to do and where to do it. And today, the choices are many.

Perhaps it's oversimplifying it, but we believe that in choosing record companies around the world three yardsticks should be used: *People, Plants* and *Prestige.*

PEOPLE: Because it takes people to promote and sell records. EMI has promotion men in every continent who are in daily contact with those who influence record sales. Continuously throughout the year close to 800 E.M.I. salesmen call on over 30,000 dealers. Each country is different, of course, in its customs and buying habits. And it's knowing that difference that pays off . . . one reason *E.M.I. sells one in every five records bought throughout the world.*

PLANTS: EMI discovered long ago that if you don't own the plant you can't be sure of getting the quality and quantity of records you want—*when you want them.* It's as simple as that . . . And as sad as that, if you're an artist with a smash hit, unable to keep up with the orders (whilst your competitors make "cover records" to fill the demand). EMI has plants in 28 countries in Europe, America, Asia, Africa and Australia and presses more than two million records a week.

PRESTIGE: A great artist brings prestige to a company, true. Also true is the fact that a great company brings prestige to an artist. Wherever you may go, EMI and its labels are best known, and have been for generations. EMI prestige is the kind that helps in all negotiations related to the record business, too . . . bookings, tours, television appearances, motion pictures, etc. Big companies, with prestige, also offer personal and financial security in terms of keeping accurate records—paying obligations promptly, supporting the artist in every area of endeavour.

Incidentally, all this takes money in the bank—lots of it. EMI has it . . . in pounds, dollars, drachmas, pesos, yen—what you will. There are few record companies that can match its prestige and financial strength.

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We start with Europe

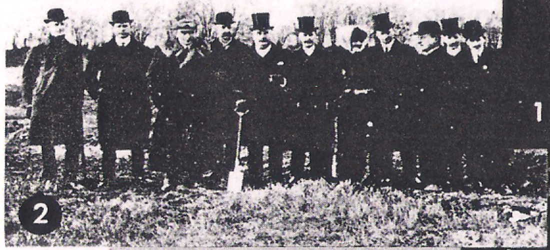
EUROPE

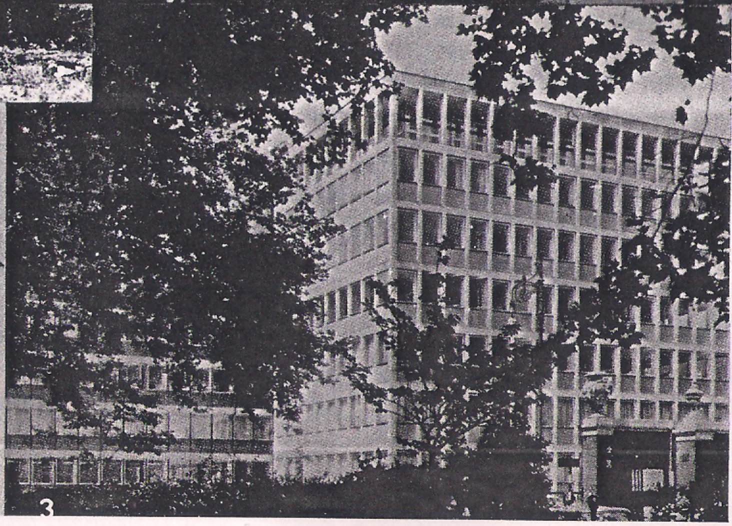
Approximately one-third of the world's record business comes from the continent of Europe.

Europe has always been the classical music centre of the world with its great concert halls and opera houses, its many famous music festivals, and a rich heritage of immortal composers, conductors and performers. Today, however, this land of classic tradition is also a lively contributor to the world of popular music . . . a movement perhaps spearheaded by the Beatles from the United Kingdom.

While tight-knit geographically, Europe presents a variety of languages, nationalities, tastes and customs. An intimate knowledge of these differences, country by country, is essential for successful marketing.

The situation is becoming more complex as many of these countries get deeper into common market participation, which presents both problems and opportunities. Surely in the next five years we will see major changes in pressing plant location, distribution patterns, pricing policies and related activities.

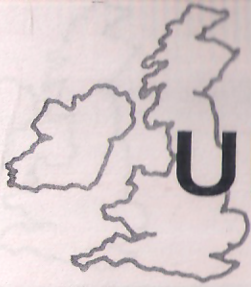




1. Sir Joseph Lockwood, Chairman of EMI, greeting H.R.H. The Princess Margaret on a visit to EMI's headquarters and factories at Hayes, March 10th 1965.

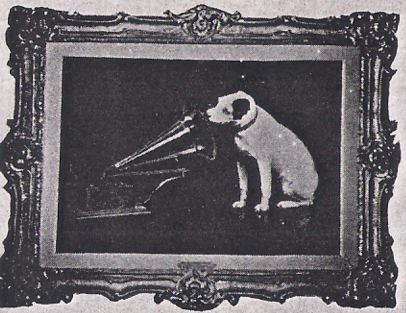
2. Mr Edward Lloyd cutting the first sod for the factory at Hayes, 1907.

3. EMI House, Manchester Square, London.



UNITED KINGDOM

BY APPOINTMENT



THE GRAMOPHONE COMPANY LIMITED
HIS MASTER'S VOICE

For many years The Gramophone Company Ltd. has been honoured with the Royal Warrant of Appointment to many members of the Royal Family, including the late King George VI and Queen Mary. This great privilege is currently enjoyed in respect of Her Majesty Queen Elizabeth II and Queen Elizabeth the Queen Mother.

The United Kingdom presents a huge record market. But it also represents a focal point of the recorded music world; for in England is located EMI Ltd, headquarters of the oldest and largest recording organization in the world.

Organized as The Gramophone Company in 1898, just a few years after the development of the phonograph, the new company first registered the ANGEL trade mark, and later adopted the slogan HIS MASTER'S VOICE with the famous "dog" trade mark. (In 1902 the company spent the exorbitant amount of £100 to record a young tenor in Italy—Enrico Caruso !)

EMI's history is rich in endless stories of great artists . . . technical and musical achievements. But tradition is only significant when it builds a solid foundation and enhances *current* accomplishment . . . "What have you done *lately* ?"

Today, EMI, Hayes, England is the "nerve centre" for 28 major recording companies in every major record market of the world plus a network of EMI Licensees in nearly every other record market imaginable . . . each company a leader in its country. EMI records bear a variety of famous trade marks, and EMI sells one in five of the world's record production.

UNITED KINGDOM

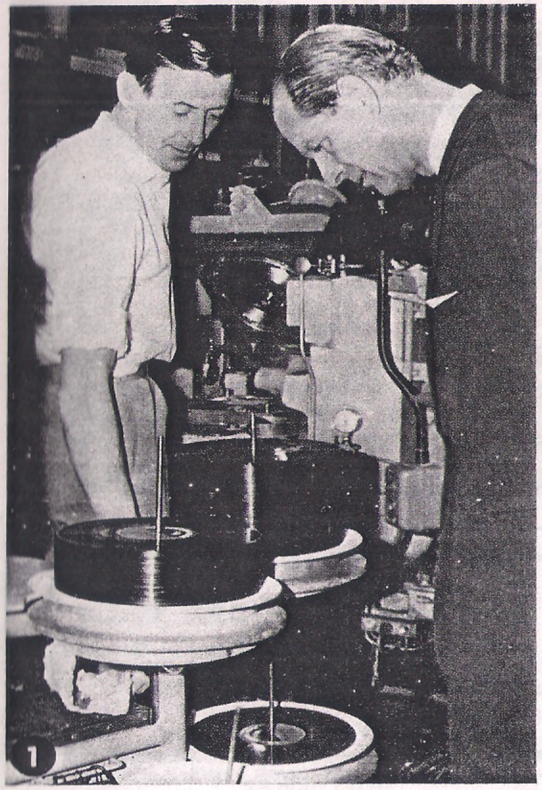
POPULATION
54,435,000 (1965)
AREA
244,013 sq. km.
MAJOR CITIES

London (capital)	7,948,800
Birmingham	1,102,660
Glasgow	1,000,857

POPULATION BY AGE GROUPS (1965)

0—14	12,670,000
15—24	7,907,900
25—49	17,210,000
50+	16,647,100

ENGLAND, SCOTLAND, WALES AND NORTHERN IRELAND


1

The English record market, while impressive in size, is served by relatively few companies when compared, for example, to the U.S.A. There are two very large organizations which together account for approximately 60% of the total business: EMI Records (The Gramophone Co. Ltd.) and The Decca Record Co., Ltd. (no connection with American Decca). Other important companies include Philips, Pye, CBS, DGG (Polydor) . . . which do about 25% of the business. The remaining 15% is spread among some 50 companies, which include record clubs. There are approximately 250 separate labels sold.

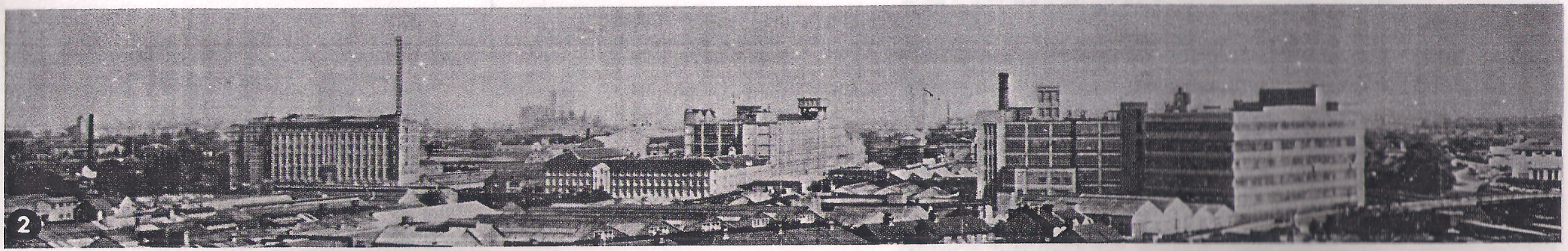
Classical records enjoy a higher percentage of total sales in U.K. than in most major world markets. London, for example, supports four major symphony orchestras, which is not true of any other city in the world.

With the advent of the Beatles, overall record sales reached fantastic heights . . . and teenage groups that followed boosted and maintained this high level of sales. In fact English artists and groups captured the lion's share of world poll ratings, and continue to hold a dominant position in sales. Despite this, the United Kingdom continues to offer a fertile market for recordings from America, the mainland of Europe and other areas.

EMI's company in England today is the largest in every respect, and has been since the birth of the record industry, back in 1898 when its business began and the Angel label was registered. Known as "The Gramophone Company, Ltd." its first international star was Enrico Caruso (1902). Through the years following, EMI in "U.K." has been in the forefront of recording and engineering development, as well as presenting the world's best-known artists in the classical and pop field.

From a plant capacity in 1907 of 700 records per week, EMI-United Kingdom increased to 19 million in the year 1929. In 1967, the company produced well over 40 million records, about half the total output of the entire country! It maintains the largest sales and distribution organization in the country, as well as a number of important retail outlets, including the famous Oxford Street Store, known throughout the world for its unique and effective merchandising methods.

In the popular field of recording, EMI-U.K. spearhead the worldwide invasion by English product with the Beatles, followed by many other successful artists and groups that continue to enjoy global sales and acceptance. EMI House, at Manchester Square, is also the headquarters for all classical activities, where the International Classical Recording Committee meets with representatives from major markets of the world to determine future policy in marketing and recording. Here, too, meets EMI's Board of Directors, distinguished leaders from many industries, as well as EMI operating heads, who direct and co-ordinate the company's global activities.

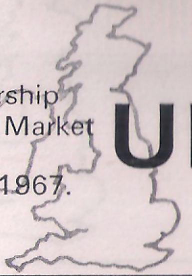

2

NUMBER OF FAMILY UNITS
16,189,000
PER CAPITA INCOME PER ANNUM
£520

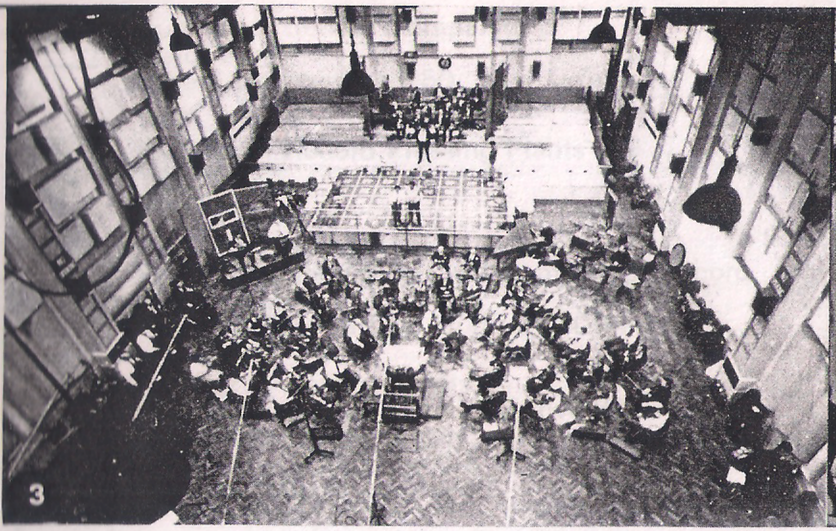
FAMILY INCOME—WEEKLY INCOME OF HOUSEHOLDS

	%
Under £20	42.1
£20—£30	30.6
Over £30	27.3

BLOC MEMBERSHIP
Member of E.F.T.A.
Application for membership for European Common Market failed 1963.
New application made 1967.



UNITED KINGDOM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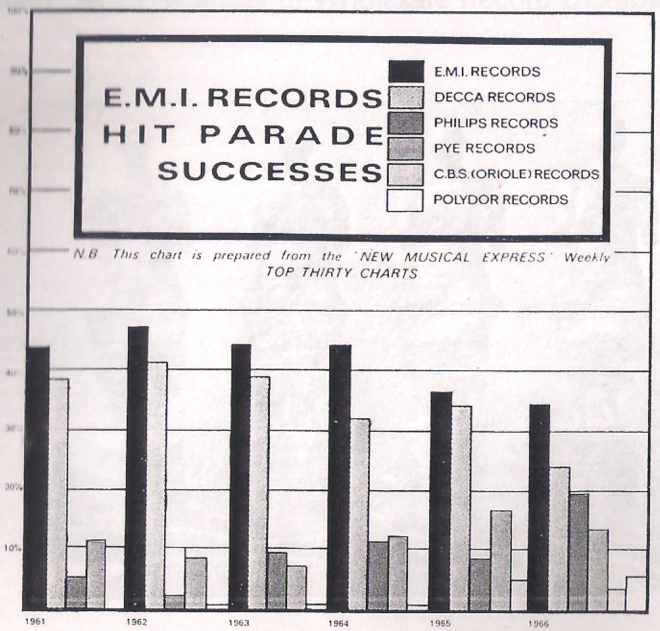


1 H.R.H. The Duke of Edinburgh watching records being pressed on a visit to EMI's Hayes factory.

2 A panoramic view of EMI's factories at Hayes, Middlesex—the world's largest record manufacturing complex.

3 A recording session in the large No. 1 Studio, St. John's Wood, London.

4 His Master's Voice Oxford Street Store, the largest record store in London—maybe in the world.

5 The lower ground floor, Popular Record Department, Oxford Street store.

5

UNITED KINGDOM

Number of Record Companies
Major 6
Others approximately 50

Number of Record Pressing Plants
Major 11
Small 4

Number of Recording Studios of Major Record Manufacturers 5
Number of Recording Studios of Others 12

Number of Record Labels
Indigenous Labels currently active 74
Indigenous Labels of Major Manufacturers 28
Additional Foreign-owned Labels pressed under licence 174

Number of Wholesale Record Distributors Approx. 20

Number of Retail Record Outlets 5,000
Number of Record Clubs 2

Estimated number of Record Players
Estimated number of homes with players 8 million
Total number of players 10 million
Number of new players annually

	Record Players	Radiograms
	000	000
1964	471	288
1965	349	240
1966	385	180

Total number of Juke Boxes in operation 25,000
On the basis of 3 records being changed each week there is a possible sale of 75,000 records per week

Number of Records Manufactured

	000	Value £000 (at manufacturers' selling prices)
1962	77,544	14,662
1963	85,455	19,167
1964	101,257	22,638
1965	93,746	21,996
1966	84,872	21,305

THE IVOR NOVELLO AWARDS

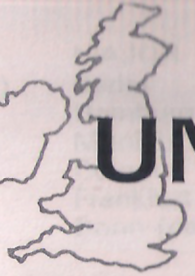
The Ivor Novello Awards were instituted in 1956 by the Songwriters Guild of Great Britain for outstanding compositions published during the year. In 1961 a further award was introduced for the Best-selling record of a British Composition. Of the six awards made since then, five have been won by EMI Records, and these handsome statuettes are illustrated here.

SILVER DISC AWARD

Presented to each artist whose records sell more than 250,000 copies in the United Kingdom

Period July 1959 - Dec. 1966

COMPANY	DISCS AWARDED	% OF TOTAL
EMI RECORDS	125	44.8%
DECCA	89	31.9%
PHILIPS	32	11.5%
PYE	31	11.1%
CBS	2	.7%
TOTAL	279	100%



UNITED KINGDOM

Mix of Records Manufactured
Popular 85% Classical 15%

Domestic and Export: Domestic 85%. Export 15%

Record Sales: Retail approx 92%, Mail Order, Clubs 8%
Consumers' expenditure on records grew by 20% p.a. between 1950 and 1957 and at about 5½% p.a. since 1957

Number of Radio Stations:
1 State authorised Network (BBC) consisting of 4 programme channels. (Commercial programmes also transmitted by Radio Manx (Isle of Man) and by the English beamed transmissions of Radio Luxembourg)
Local broadcast stations will be operational by the end of 1967

Radio Receiver Ownership
Percentage of Radio Receiver Ownership 95% in 1966

Television broadcasting of records
2 State authorised Channels—1 VHF and 1 UHF
14 Commercial—all UHF
Colour TV operational in 1967

Principal stations BBC 1, BBC 2, ABC TV, Associated Television, Granada Television, Rediffusion
Number of Families owning TV 92%

Pre-recorded tape
Available 2 Track reel to reel
4 ,, ,, ,, ,,
4 ,, Musicasettes
Sales 1966 427,500 units
Est. number of playback units 6 million

MISCELLANEOUS:
No. of Motion Picture Theatres 1,972
Other theatres Approx. 350

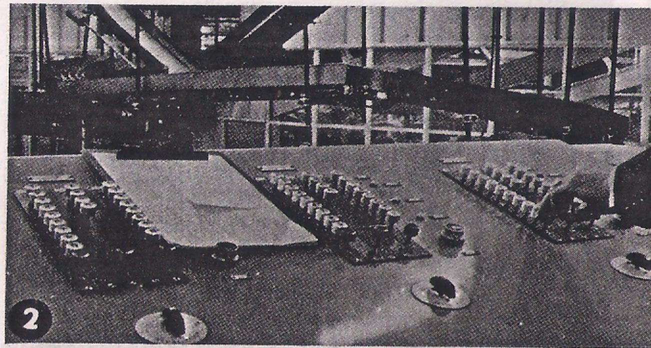
Music Magazines:
Approx. 12 weekly periodicals dealing with the industry and numerous monthly magazines devoted to classical music

Number of Music Publishers:
21 principal houses plus a number of smaller publishing houses

Music Trade Associations: 7

Music Licensing Organisations:
The Mechanical Rights Society represents the majority of copyright owners in dealing with the manufacture and sale of records of copyright music. The Performing Right Society licenses the public performance of copyright music

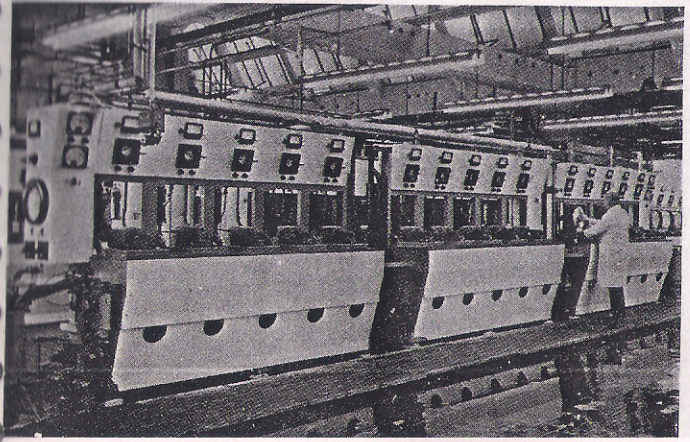
Copyright:
Copyright is automatic and not dependent upon any formalities



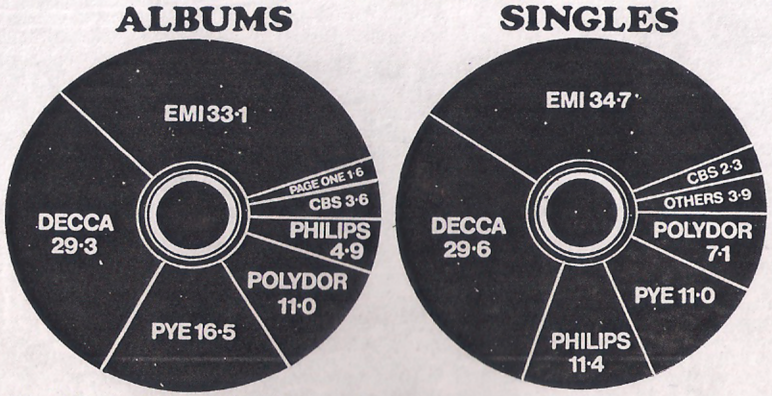
1 General view of the Matrix Deposition Plant at Hayes.

2 Electronic Control Panel for the Automatic Dispatch System for records at EMI's Hayes factories.

3 Ground floor Popular Record Department, EMI's store, Cranbourn Street, London.



from "RECORD RETAILER" May 1967:



DIAGRAMS ABOVE SHOW THE SHARE OF CHART POINTS BY PERCENTAGE FOR INDIVIDUAL COMPANIES IN SINGLES AND ALBUMS.

GERMANY

POPULATION
59,638,000 (1966)

AREA
248,534 sq. km.

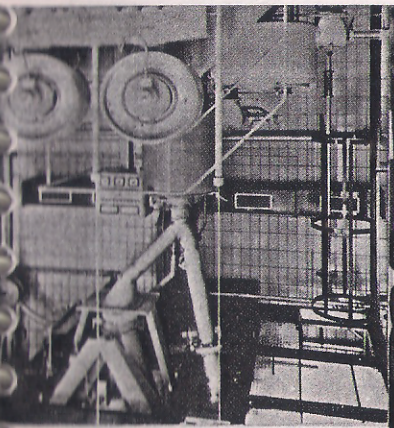
MAJOR CITIES

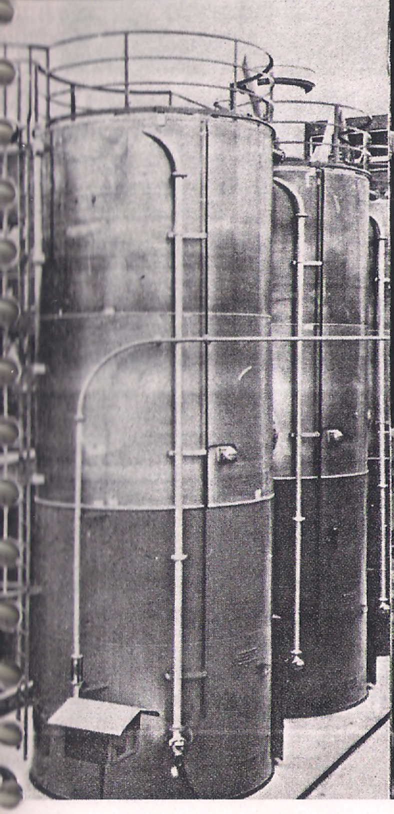
Berlin	2,190,600
Hamburg	1,851,230
Munich	1,231,500
Cologne	861,000
Frankfurt	684,800
Bonn (capital)	140,500

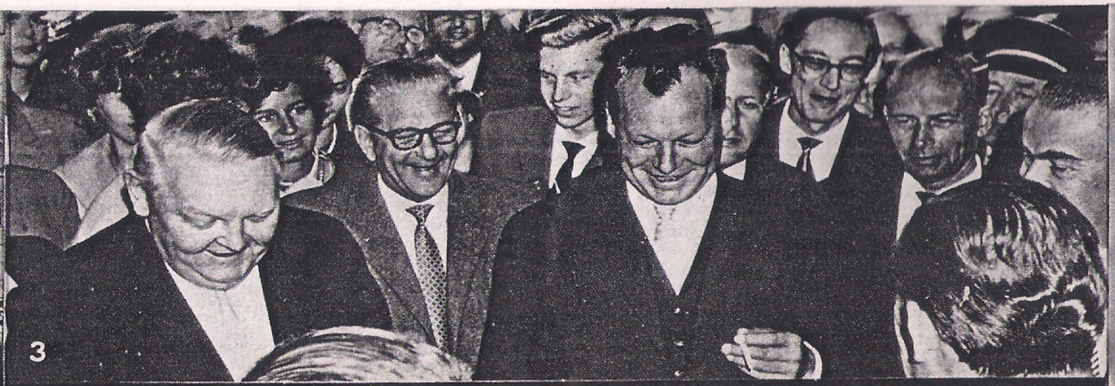
POPULATION BY AGE GROUPS (1963)

0—14	12.5 million
15—24	7.9 ,,
25—49	18.0 ,,
50+	17.0 ,,

NUMBER OF FAMILY UNITS
Approx. 18 million







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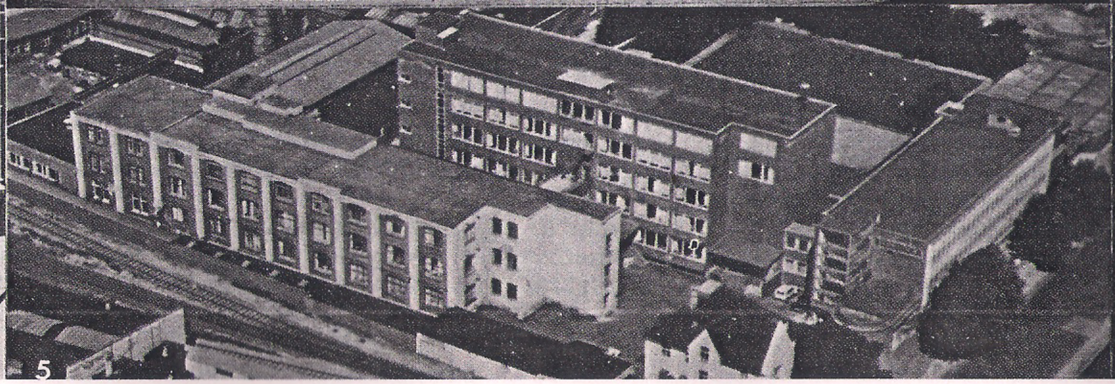

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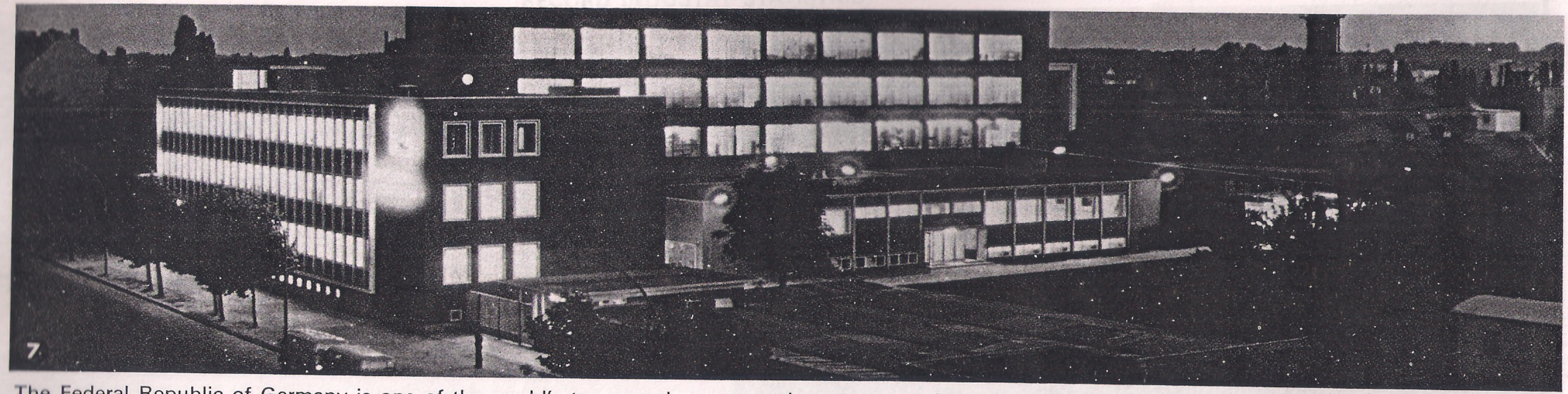
1. P.V.C. Mixers and Control Unit, Electrola factory.
2. Outdoor Silos for raw material storage, Electrola factory.
3. Phono Exhibition Berlin 1961. Federal Chancellor Prof. Erhard and Willi Brandt, Mayor of West Berlin, visit the Electrola stand.
4. Electrola's stand at 1961 Berlin Phono Exhibition.
5. Aerial view of Electrola's Cologne plant.
6. The Federal Chancellor, Dr. Konrad Adenauer, receives Electrola's Managing Director, Dr. Veder, in his official residence, Palais Schaumburg, Bonn. Dr. Veder presents the first two record sets of Dr. Adenauer's memoirs.
7. View of Cologne plant. (Opposite Page)

6

EXCHANGE RATE £1 = DM 11.1
PER CAPITA INCOME PER ANNUM £523
BLOC MEMBERSHIP
Member EEC (Common Market)
Member of OECD

GERMANY



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The Federal Republic of Germany is one of the world's top record areas, accounting for about one quarter of Europe's total sales and representing its second largest market. However, it presents unique and peculiar problems, the understanding of which is essential to successful participation.

West Germany is now an autonomous Federal Republic but the influence of the three former occupied zones has continued to some extent in popular music. (English in the north, American in the west and south, and French in the southwest.) Up to date there is no specific German "sound" in pop music, as we have in U.K., U.S.A., France and Italy. Buyers follow international trends more than other major markets.

The situation in the classical field is entirely different. Here the great German heritage and tradition dominates, and German artists of international and local fame are many. Over 30% of all LPs sold are classical, probably the world's highest percentage. Comparable figures in the U.S.A., U.K. and France are appreciably lower than that.

Today, Germany offers a lucrative market for international pop stars, to the degree that some are now recording their hits in the German language for simultaneous release. The area is prosperous and the future promises further growth and development.

EMI's company in Germany—Electrola—presents a heritage of almost three quarters of a century, its antecedents going back to 1897, when the name Parlophone was created by a mechanic from Sweden, Carl Lindström, who set up a workshop in Berlin. Expansion and mergers followed through the years, as trademarks like Electrola and Odeon were added, as well as the marks of the EMI group, to a point where the company supplied the bulk of the German market.

Following World War II, the company reorganized its shattered assets in Berlin, ultimately transferring the headquarters and huge factory to Cologne. While constituting one EMI unit, Lindström remains the name of the manufacturing company and Electrola is responsible for the intensive distribution and sales activity. The company today accounts for about one in six records sold on the German market, maintaining depots in cities such as Hamburg, Hanover, Frankfurt, Stuttgart and Munich as well as Cologne and Berlin.

While Electrola does a great amount of recording in its own studios, both classical and pop, it is in an ideal position to take advantage of the demand in separate areas of West Germany for American, English and French records from its EMI sister companies, Capitol, EMI-UK and Pathé-Marconi. The area is truly international, as its hit artistes for example include Gitte, a young Danish artist, and Wanda Jackson from the U.S.A., whom Electrola re-records in German, developing new hits, which sell into the hundreds of thousands in Germany, and are exported to many other world areas. Electrola offers one of the best examples of a "family effort" for all EMI artistes, with a high potential for sales.

GERMANY

RECORD INDUSTRY STATISTICS

Number of Record Companies
Major 5
Others 28-33

Number of Record Pressing Plants 5

Recording Studios of Major Record Manufacturers....15

Number of Record Labels
Indigenous Labels currently active....23

Number of Wholesale Record Distributors....25

Number of Retail Record Outlets....Roughly 6,000

Number of Rack Jobbers....2

Estimated number of Record Players....8.5 million
1965 Production: 1,510,085

Total Juke Boxes in operation....60,000
Using 3.6 million records annually

Number of Records Manufactured

1965 UNITS		1966 UNITS	
7″ Single	30,648,508	7″ Single	29,850,224
7″ EP	9,890,461	7″ EP	6,887,667
10″ LP	1,619,122	10″ LP	957,877
12″ LP	24,090,104	12″ LP	27,554,670
Total Mftd.	66,248,195	Total Mftd.	65,250,438

Number of Records Sold:

1960	47,911,878 units
1961	49,576,352
1962	47,599,730
1963	42,268,488
1964	43,065,737
1965	49,154,441
1966	47,533,193

Mix of Records Sold (1966)
Domestic 47,533,193 (incl. imported)
Export 12,658,213

Popular	49,225,030 (1966)
Classical	16,025,408
	65,250,438

Retail Value of Records Sold (1966)
Est. DM 350 million

Average Retail Price

12″ LP	—	DM 17
10″ LP	—	DM 15
7″ EP	—	DM 8
7″ Single	—	DM 4.75

Record Clubs
(1) Bertelsman
(2) Deutscher Bücherbund
(3) Deutsche Buchgemeinschaft
(4) Herder-Verlag
Total Sales of Clubs are close to 15% of total.

GERMANY

RADIO/TV

GERMANY AIR-PLAY

RADIO BROADCASTING

Number of Stations
11 govt.
4 private

Principal Stations
Government: NDR, SFB, RB, WDR, DW, SR, SWF, DLF, HR, BR
Private: AFN, FBS (formerly BFN), RFE Munich, Rias Berlin

Relationship AM/FM
Every MF programme wide area, VHF regional only
First Prog. (Govt.) is MF & VHF, others are VHF
11 Government Stations own 46 medium wave and 39 FM transmitters.

Importance of Disc Jockeys, Appearances
Each Govt. Station has own D.J.s, and 3 have free-lance D.J. programmes.

Percentage of Receiver Ownership
Approximately 90%

TELEVISION BROADCASTING OF RECORDS

Three Programmes
1st Prog.: NDR, WDR & 6 regional stations
2nd Prog.: Central Stn., Mainz
3rd Prog.: Owned by NDR & WDR
A 4th private programme planned

MISCELLANEOUS

PRE-RECORDED TAPE IN GERMANY

Mostly 2 track mono
1966 est. Sales: 200,000 Tape Units
Est. number Play-Back Units . . . . . . 3 million

MISCELLANEOUS MUSIC BUSINESS

Number of Music Publishers 210

Music Trade Associations
Deutscher Musikalien-Wirtschaftsverband, Bonn
Deutscher Radio-und Fernseh-Fachverband, Cologne
Deutscher Rundfunk-und Fernseh-Fachgross-händler—Verband (VDRG), Cologne

Music Licensing Organizations
GEMA (Berlin & Munich)

Musical Copyrights issued by
GEMA & Verwertungsges Wort.

Instrument Sales
1965 production in units

Pianos	19,662
Grand Pianos	3,092
Organs	296
Wind Instruments	547,596
Accordions	100,051

FRANCE

POPULATION
49,157,000
(estimated 1965)
AREA
551,203 sq. kms.

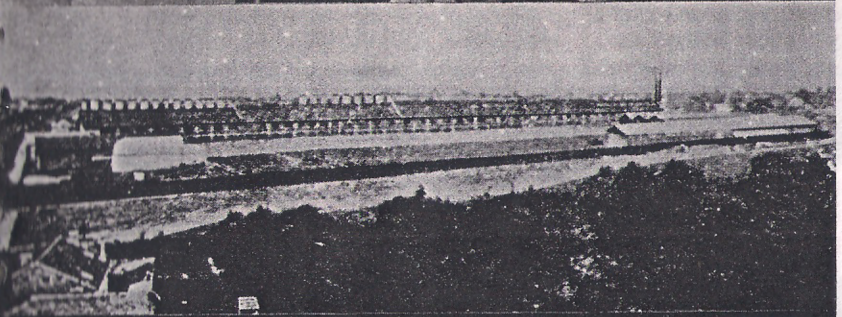
MAJOR CITIES

Paris (capital)	6,524,000
Marseilles	783,738
Lyons	543,519
Toulouse	330,570

POPULATION BY AGE GROUPS (1964)

0—14	12 million
15—24	6.9 million
25—49	15.1 million
50+	14.4 million
TOTAL	48.4 million

Number of Family Units
15,200,000
EXCHANGE RATE
13.85 Fr. Frs.=£1
PER CAPITA INCOME
PER ANNUM £517



France, the birthplace of many of our great composers and artists, represents one of the major record markets of the world. Nationalistic tendencies strongly influence the French record buyers in their choice of artist and selection, to a greater degree perhaps, than in most countries. Nevertheless, many foreign artists, both pop and classical, enjoy wide acceptance and sales in France, particularly following personal appearances and "live" performances.

Since the advent of the microgroove record in 1947, the French market continued to expand, year after year. Only recently did this expansion stop, and a slight drop in sales ensued.

The popular record market dominates, as in all countries, but uniquely 45 rpm single sales are negligible, with the bulk of the releases on 45 rpm EPs. Classical sales account for about 15% of the market, with strong competition and low-priced labels rampant. French semi-classical music and operettas represent an important market segment. However, LP sales are less significant, with 30% of the total LP turnover coming in the two months of seasonal sales, November and December.

There are a great number of pop records issued in France—640 in December 1966—yet it is estimated that over 50% of the total sales are made on only four or five best sellers, on which major effort is concentrated.

EMI's French company bears the name of two of the pioneers in recorded sound—the brothers Charles and Emile Pathé, who started the business in a bistro near the Place Pigalle and built a small factory in 1894 at Chatou, a Paris suburb. In 1936 the organization became Pathé-Marconi, the company which continues to dominate the French record market, with new and modern factories, recording and photograph studios, its own retail outlets and a roster of artists unmatched by any other French company.

The French record market is, of course, dominated by its economy, which is in turn influenced by political activity. Irrespective of temporary ups and downs, however, it stands high as a record market, with one in every three homes possessing a record player, and approximately 600,000 new players sold annually.

FAMILY INCOME

	No. of Families
Low	10,300,000
Medium	3,000,000
High	1,900,000

BLOC MEMBERSHIP
E.E.C. (Common Market)
O.E.C.D.

FRANCE

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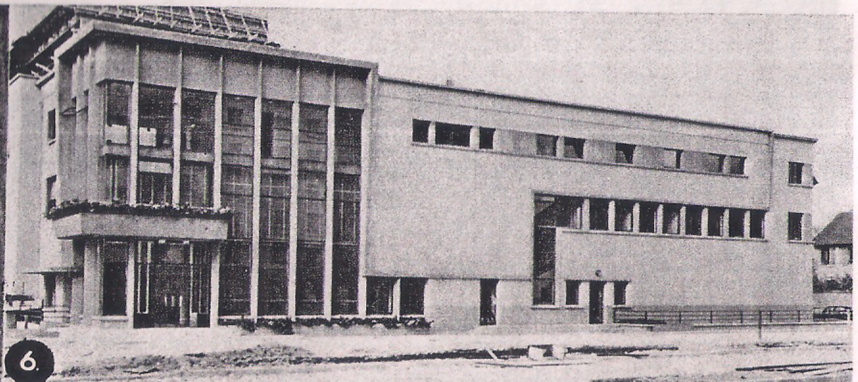

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1 The Brothers Charles and Emile Pathé. Photograph taken in 1902.
2 The Pathé-Marconi factory at Chatou in 1899.
3 The Champs Elysées at night. The Pathé-Marconi Retail Store is seen on the left-hand side.
4 Serge Lifar, Maurice Chevalier and Tino Rossi.
5 The Retail Store, 30 Boulevard des Italiens.
6 Pathé-Marconi's new recording studios in the Paris suburb of Boulogne-Billancourt.
7 Pathé-Marconi's Enrico Macias.

FRANCE

Number of Record Companies
Major 9 Smaller or independent. Approx. 35

Number of Record Pressing Plants 20

Number of Recording Studios 21

Number of Record Labels
1) Indigenous Labels currently active 62
2) Indigenous Labels of Major Manufacturers 33
3) Additional foreign owned labels 82

Number of Wholesale Record Distributors 35

Number of Retail Record Outlets, about 4,200

Number of Record Clubs 3
In 1965 Club sales were 5.5% of total records turnover.

JUKE BOXES
Total in operation 30-35,000

Estimated Number of Record Players
Approximately 5.1 million
Less than 10% are Stereo Units
Number of New Players Sold Annually
Approximately 600,000

Mix of Records Manufactured

By diameter

1966	000
12″	12,465
10″	895
7″ STD	4,638
7″ EP	24,226
7″ 33⅓	1,116
	43,340

By playing speed

1966	000
45 rpm	28,864
33⅓ rpm	14,476
78 rpm	NIL
	43,340

	Records Sold (000)	Wholesale Value (Fr. 000)
1961	23,000	151,000
1962	28,000	181,000
1963	41,000	216,000
1964	44,728	262,168
1965	44,223	266,354
1966	40,460	290,950

Estimate of Sales by Repertoire Type:
Popular 85% Classical 15%

A group of Pathé-Marconi artists at Deauville – Richard Anthony, Régine, Adamo, Marie Bell and Jean-Claude Brialy.

Alfred Cortot and Marguerite Long.

Maurice Chevalier and George Chelon.

FRANCE

Mix of Record Sales
Domestic (Incl. Imports) vs Exports
85% 15%
Local Taxes @ 2.5% on Retail Price.

RADIO BROADCASTING

Number of Stations
4 Private 3 Government
Principal Stations:

Private Stations:
Radio Monte Carlo
Radio Luxembourg
Europe 1
Radio Andorre

Govt. Stations:
France-Inter
France-Culture
France-Musique

Percentage of receiver ownership 95%, of whom 25% own more than 1 set.

TELEVISION

Number of Stations 2 Government
Principal VHF/UHF Stations
Government:
O.R.T.F. Paris and 32 Regional Stations
Private:
Tele Monte Carlo TV Luxembourg transmissions are received in France

Number of families owning TV End 1965
7.5 million
Number of hours Colour TV 3 hours per week
Experimental Colour TV Marketing Begins Sept. 1967

PRE-RECORDED TAPE

Types available
¼" ordinary tapes; cassettes
Sales, Recent Year
Estimated 30,000 for 10 mths, 1966.
Sales of Cassettes a Month
about 3,000 @ Fr. 32.90

Number of Music Publishers
Approximately 150

Music Licensing Organizations
B.I.E.M. (S.D.R.M.) S.A.C.D. (Mechanical Rights)
S.A.C.E.M. (Performing Rights)

Consumer Periodicals Devoted to Records 11

Number of Motion Picture Theatres 5,285
Number of Other Theatres 619

Edith Piaf.

Georges Auric presenting Franck Pourcel with his "Disque d'Or".

Gilbert Bécaud being greeted after a successful tour in the United States by François Minchin, Président Directeur-Général of Pathé-Marconi.

ITALY

POPULATION (1966)
53,129,105

AREA
301,000 sq. km.

MAJOR CITIES

Rome (capital)	2,400,000
Milan	1,700,000
Naples	1,300,000
Turin	1,100,000

POPULATION BY AGE-GROUPS

	(Millions)
0-14	12.5
15-24	7.9
25-49	17.4
50+	13.1

1. The new E.M.I. factory at Caronno Pertusella, some 9 miles from Milan.
2. Famous Neapolitan singer Sergio Bruni in the retail shop of E.M.I.'s Italian company in Milan.
3. Al Bano, Italy's foremost pop singer—an exclusive artist of *E.M.I. Italiana.*

Italy, as all the world knows, is the home of opera. In such historic and magnificent structures as La Scala at Milan, and the Rome Opera House, the great singers of yesterday and today performed and recorded.

It is therefore perhaps surprising to note that the Italian record market, like the rest of the world, is largely dependent upon the sale of pop records (85%)—mostly 45 RPM singles. Classical repertoire is important (14% of total), of course, but the current trend is toward the low priced and budget lines, which are exerting pressure on new releases at "regular price". Heavy discounting is rampant, comparable to the United States.

A major problem facing Italian record companies is the exposure of new songs. Song festivals, such as at San Remo, are vitally important showcases for new material, due to the difficulty of getting adequate promotion through radio exposure, so routine in most countries.

The many problems peculiar to this market call for an intimate understanding of local conditions and practices to assure even moderate success in record sales. However, the Italian economy is growing, and well-established record companies should show proportionate gains in the year ahead. On the technical side Italy has emerged as the country where spectacular progress has been made in the development and practical application of injection moulding for record manufacture.

The origins of EMI's Italian organization go back to the turn of the century, as the Fonotipia Company, which later became part of the group, was established in 1904. The group trademarks "La Voce del Padrone", Columbia and Odeon, have always played a major part in the record industry in Italy, and when the business grew substantially in the fifties and sixties, plans for a new, more modern factory were completed. In 1967, a new company was formed to operate the factory and record marketing organization—*EMI Italiana,* which is now the official name of EMI's company in Italy, accounting for approximately one record in six sold on the Italian record market.

NUMBER OF FAMILY UNITS
11.9 million
EXCHANGE RATE
£1=1,750 lire
PER CAPITA INCOME
PER ANNUM £314
BLOC MEMBERSHIP
Member of E.E.C. (Common Market)
Member of O.E.C.D.

ITALY

Number of record companies with own manufacturing plants 22

Number of professional recording studios
Major 10, Smaller: about 50

Number of record labels
About 400 (handled by some 130-150 different companies) of which:
major Italian labels: 15
major foreign labels: 40

Number of homes with record players: About 3 million

Juke boxes in operation: about 30,000

Number of records manufactured:
No official statistics, but 1966 production can be estimated at.

7″ records	27 m.
Long play records	3 m.
Total	30 m.

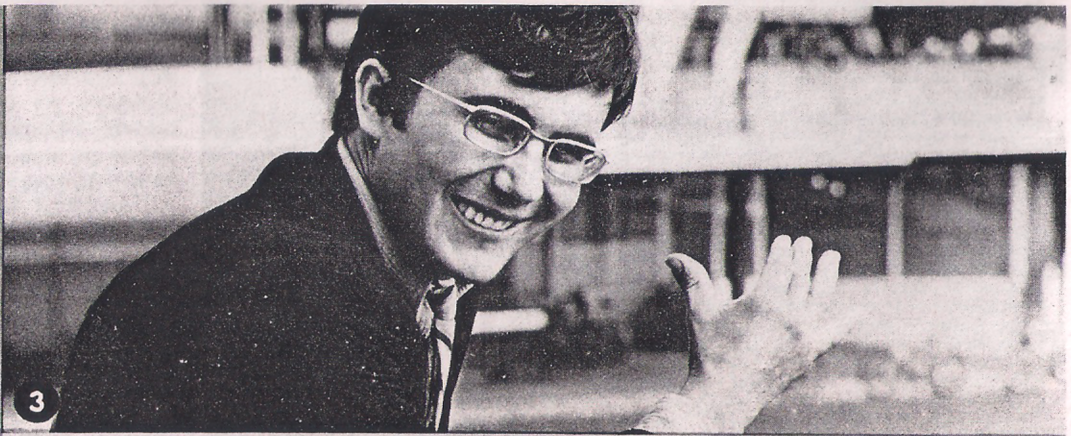
Note: 7″ were nearly all singles, LP's nearly all 12″ (EP's and 10″ LP's are virtually dead)

Value of production (estimated): (1966)
At wholesale prices: 15 milliard lire (£ 8.6 m.)
At retail prices: 25 milliard lire (£14.3 m.)

Mix of records sold:
Popular 85% Classical 14% Other 1%
Domestic market (incl. imports) is 90% of total, export 10%

Growth of record market:
1966 sales were approximately double those for 1960
Standard priced product: 85% of market
Low priced product: 15%

RADIO BROADCASTING
128 medium wave stations, all government owned, using 16 different frequencies, and broadcasting 3 separate programmes (two general and popular, one mainly classical).
No record may be broadcast without prior approval by special committee of radio authorities



3

Few teenage programmes.
The national programmes are also broadcast on FM, and special programmes are also transmitted by "wire diffusion" linked with telephone network.

TELEVISION
Government owned, two channels
(Swiss TV can be seen in some areas)

PRE-RECORDED TAPE
33,000 cassettes sold in 1966, 1967 sales will be greater.
4-track and 8-track cartridges of little importance so far.

MISCELLANEOUS MUSIC BUSINESS
Music Magazines:
Trade Publications 2, Consumer Periodicals 3
12,000 Motion Picture Theatres
Music Publishers—At least 100
Music Trade Associations:
Record Manufacturing Association (AFI)
Retailers Association
Music licensing Organizations:
Retailers Association
Music licensing Organizations:
SEDRIM, representing BIEM: controls bulk of repertoire, remainder controlled by independents and dissident association.
Musical Copyrights issued by
Societa Italiana degli Autori ed Editori

SPAIN

POPULATION (1965)
31,604,000
AREA
504,748 sq. km.
MAJOR CITIES

Madrid (capital)	2,260,000
Barcelona	1,558,000
Valencia	505,000
Sevilla	442,000

POPULATION BY AGE GROUPS

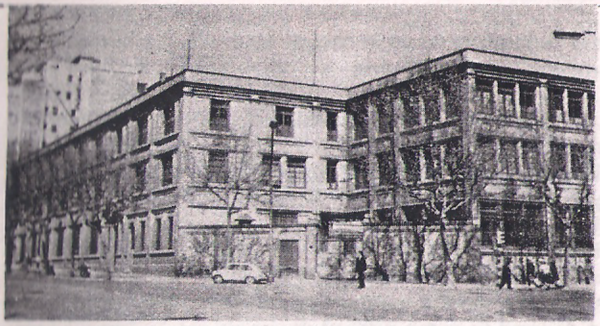
0—14	8.4 million
15—24	4.6 million
25—49	10.6 million
50+	6.9 million
TOTAL	30.5 million

NUMBER OF FAMILY UNITS
6,437,000

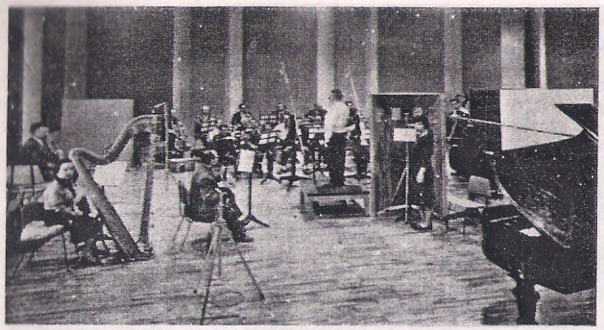
EXCHANGE RATE
£1 = 168 Pesetas
PER CAPITA INCOME
PER ANNUM £217
FAMILY INCOME

Low	75%
Medium	18%
High	7%

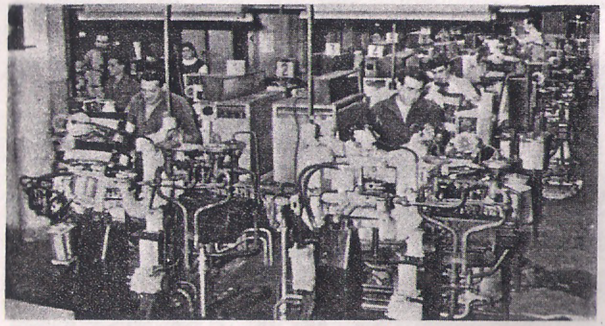
BLOC MEMBERSHIP O.E.C.D.



The Spanish Company's offices and factory in Barcelona.



Recording Lina Richarte in C.G.O.'s Barcelona recording studios.



Part of the record press room of the Barcelona factory.

Spain presents to the world a rich musical heritage in its own folk music and in the classics, with its famous singers, conductors and composers. Formerly limited by internal problems, Spain is now moving rapidly ahead as a significant market for records due to some degree to greater flexibility in government regulations, which has increased foreign investments and improved the economy. In the past five years the value of its records manufactured has almost tripled, with pop records dominating sales (93%) and teenage buyers supporting their "idols" ; as in most countries.

Spain is now a desired objective of tourists who arrive by increasing millions each year, adding materially to per capita income, and carrying away a substantial number of records as souvenirs and gifts.

EMI's Spanish Company, Compañia del Gramofono-Odeon S.A.E., has always occupied the leading position in the country's record business, carrying on its business even during the tragic years of Civil War (1936-39). The company's roots are deep, going back over a half-century. Today EMI is expanding to serve the country's economic growth and new opportunities.

A historic photograph of Carmen Flores, taken in the Barcelona recording studios in 1920

Number of Record Companies
Major 7 Minor 13

Record Pressing Plants 9

Number of Recording Studios
Major Record Manufacturers 4
Smaller or Independent Manufacturers 7

Total Number of Indigenous Labels Currently Active 24
Total Number of Indigenous Labels of Major Manufacturers 17
Additional Foreign-owned Labels pressed Under Licence 88 (42 Active)

Value of Records Manufactured in Spanish Pesetas		Number of Records Sold		Retail Value of Records Sold in Spanish Pesetas	
1960/61	56 million	1960/61	3,300,000	1960/61	360 million
1961/62	75 million	1961/62	4,200,000	1961/62	450 million
1962/63	100 million	1962/63	5,200,000	1962/63	560 million
1963/64	112 million	1963/64	5,800,000	1963/64	627 million
1964/65	116 million	1964/65	7,300,000	1964/65	780 million
1965/66	144 million	1965/66	8,500,000	1965/66	900 million

Mix of Records Manufactured

By diameter		By playing speed	
12"	900,000	45 rpm	7,740,000
10"	360,000	33⅓ rpm	1,260,000
7"	7,740,000		

Sales by outlets		By Repertoire	
Domestic Retail	8,600,000	Popular	8,310,000
Wholesale	——	Classical	600,000
Club	200,000	Other	90,000
Juke Box	200,000		

RADIO BROADCASTING
Number of Stations: 164 Private Stations
Receivers in 85% of homes

TELEVISION BROADCASTING
Number of Stations
2 Government owned (1 VHF and 1 UHF)
3 million familes own TV (end of 1966)
500,000 sets sold per year

Number of Music Publishers 10

Number of Motion Picture Theatres 7,897

IRELAND

POPULATION (1966)
2,881,000
AREA 70,280 sq. km.
MAJOR CITIES

Dublin (capital)	537,448
Cork	77,980
Limerick	50,786

Ireland has usually been regarded as an extension of the U.K. record market and has always closely followed developments in the U.K.

Nevertheless EMI established its own company in Ireland in 1936 and has a record pressing plant in the Waterford factory. Until 1966, this was the only pressing plant in the country. This plant presses 7" EP and single records, other types being imported from the U.K. EMI Ireland is active in developing and promoting Irish artists and some of this repertoire is issued in a number of other countries. It is also keenly alive to the possibilities of exploiting in Ireland discs of English and American origin.

POPULATION BY AGE GROUPS (1961)

0—14	0.9 million
15—24	0.4 million
25—49	0.8 million
50+	0.7 million
TOTAL	2.8 million

NUMBER OF FAMILY UNITS 700,000
EXCHANGE RATE
£1 = 1 Irish £
PER CAPITA INCOME PER ANNUM £300
BLOC MEMBERSHIP
O.E.C.D.

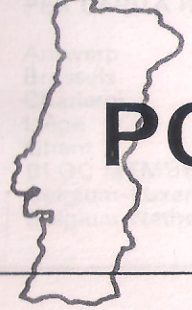
Number of Record Manufacturing Companies 2
Number of Recording Studios 4
Estimated number of Record Players sold 90,000
sold each year 1,500
Total Juke Boxes in Operation 600
Number of Records Sold

7" Singles	606,757
7" EPs	102,365
LPs	168,710
Total	877,832

Radio Broadcasting
Number of Radio Stations 1 (Radio Eireann)
Number of houses with Radios 400,000
Television Broadcasting of Records
Number of Television Stations 1 (Telefis Eireann)

This photograph of a consignment of records leaving EMI's Irish factory is not intended to give our Irish friends a 19th century image! Far from it—they are a lively and amusing crowd. It does show, however, that EMI are an adaptable organization. When in Rome—do as the Romans do!

PORTUGAL



POPULATION (1966)
9,228,000
AREA 91,971 sq. km.
MAJOR CITIES

Lisbon (capital)	820,000
Oporto	310,000
Setubal	44,030

POPULATION BY AGE GROUPS

0—14	2.7 million
15—24	1.4 million
25—49	3.0 million
50+	2.0 million
TOTAL	9.1 million

NUMBER OF FAMILY UNITS 2,400,000
EXCHANGE RATE
£1 = 80.17 Escudos
PER CAPITA INCOME PER ANNUM £135
BLOC MEMBERSHIP
Member of O.E.C.D.
E.F.T.A. and G.A.T.T.

Record Manufacturers 6
Number of Recording Studios 1
Radio Stations 19
Television Stations 1

Portugal is a limited but stable market, primarily for extended play records. There is no demand for singles and LPs sell in only limited quantities.

EMI's Manufacturing Associates in Lisbon maintain an efficient distribution system, pressing plant and have newly-built recording studios. LPs are imported from the U.K. and from other continental branches of EMI.

The sad fados of Portugal find wide acceptance in other markets, particularly in Brazil and the most famous fado singer of our day, Amalia Rodriguez is widely known for highly successful concert tours in the U.K. and for many appearances in France and continental Europe.

Amalia Rodriguez, the internationally famous fado singer.

BELGIUM

POPULATION
9,328,000 (1964)
AREA
30,506 sq. km.
MAJOR CITIES

Brussels (capital)	1,407,660
Antwerp	856,845
Liège	608,827
Charleroi	467,752
Ghent	457,312

POPULATION BY AGE GROUPS (1963)

0-14	2.2 million
15-24	1.2 million
25-49	3.0 million
50+	2.9 million
TOTAL	9.3 million

3 million FAMILY UNITS
EXCHANGE RATE
£1=140 Belgium Fr.

PER CAPITA INCOME PER ANNUM

	Purchasing Power %	Population %
Antwerp	11	9.4
Brussels	21.6	15.4
Charleroi	5.1	5.1
Liège	8.2	6.7
Ghent	4.8	5

BLOC MEMBERSHIP: E.E.C.
Belgium-Luxembourg Convention 1921
Belgium-Netherlands-Luxembourg Treaty 1958

Number of Record Companies 21
Number of Record Pressing Plants 4

Number of Recording Studios
Major Record Manufacturers (3)
Smaller or Independent Manufacturers (3)

Total Number of Indigenous Labels of the Major Record Manufacturers 5

Number of Record Retail Outlets 900
Number of Record Clubs 4

Estimated Number of Homes with Record Players 1 million
Estimated Number of New Players Sold Annually 120,000

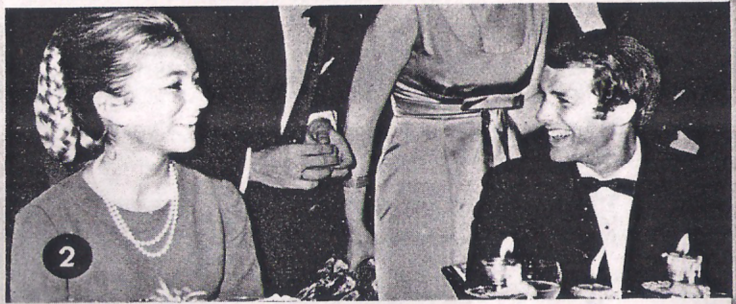
JUKE-BOXES
Total in Operation
S.A.B.A.M. Figure: 30,000

Number of Records Sold (local manufacture)

1966	000
45 rpm	2,525
33 rpm	170

Belgium, although strongly under the influence of France as a record market, has nevertheless developed artists and hit records in its own right like Adamo, who are important far beyond its borders. Despite its difference in languages and racial heritage, the country offers a compact, attractive and prosperous record market with a high standard of living and a growing economy. Brussels is the home of many central institutions of the Common Market and the transfer of NATO there further increases the importance of the capital as a European centre.

As elsewhere, the market is dominated by pop records for teenagers and there is strong competition and heavy discounting due to the attractiveness and prosperity of the market and the ease of importing records from elsewhere in Europe. EMI's company, S.A. Gramophone N.V, is well placed to meet such competition, having been established in Brussels since the early days of the gramophone. It enjoys about a one-fifth share of this important market and, despite the disruptive effects of two occupations on the country, has built and maintains a strong sales and distribution set-up and close contacts with the other EMI companies in the U.K. and continental Europe.



1 The Head Office of S.A. Gramophone N.V. in Brussels.
2 Adamo with H.R.H. The Princess Paola of Belgium. This famous Belgian artist wrote a song dedicated to the Princess, called "Paola".
3 Sir Joseph Lockwood, Chairman of EMI, congratulating Jean Crabbe, aged 86, who started working for S.A. Gramophone in 1900.

Number of Records Sold (inc. imports)

1965	000
45 (s) & EP	5,943
$33\frac{1}{3}$ LP	2,211
1966	
45 (s) & EP	7,184
$33\frac{1}{3}$ LP	2,346

RADIO BROADCASTING
9 Government-owned Stations (French & Flemish)
Percentage of Receiver Ownership 90%

TELEVISION BROADCASTING
2 Government-owned Channels
Number of Families Owning TV 1,700,000
Sales of TV Sets 215,000 per year

PRE-RECORDED TAPE: Types Available
4-track Stereo U.S.
8-track Stereo Imports. Musicasettes
Estimated Number Play-Back Units 25,000

MISCELLANEOUS MUSIC BUSINESS
Number of Motion Picture Theatres in Belgium June 1966 1,085
Number of Major Music Publishers 11
Music Licensing Organizations
S.A.B.A.M. – public performance, mechanical rights
S.A.C. – dramatic, literary
S.A.C.E.M. – authors, composers
S.O.G.E.D.I. – (special group) – mechanical reproduction rights handled globally through S.A.B.A.M.
Musical Copyrights Issued by S.A.B.A.M.

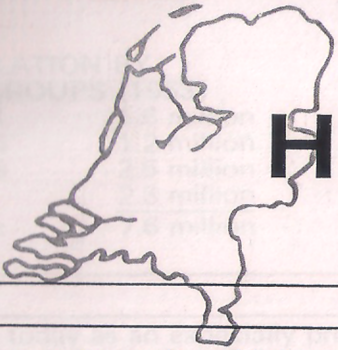
POPULATION
12,411,000 (1966)
AREA
34,830 sq. km.
MAJOR CITIES

Amsterdam (capital)	864,300
Rotterdam	730,700
The Hague	660,000
Utrecht	271,078
Eindhoven	181,600

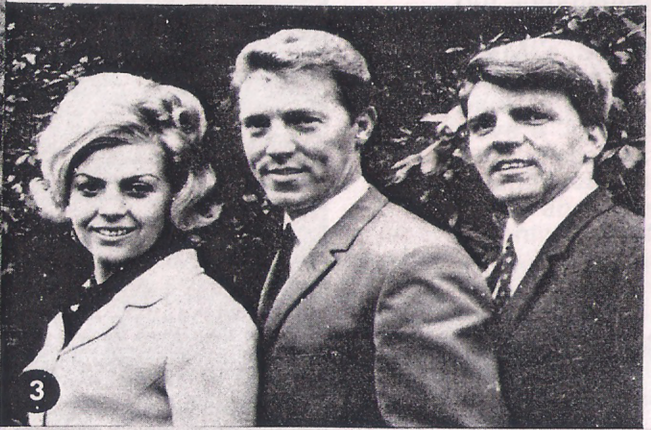
POPULATION BY AGE GROUPS (1964)

0—14	3.4 million
15—24	2.0 million
25—49	3.8 million
50+	2.9 million
TOTAL	12.1 million

NUMBER OF FAMILY UNITS
Estimated 3.3 million
EXCHANGE RATE
£1=10.1 guilders
PER CAPITA INCOME PER ANNUM £500
BLOC MEMBERSHIP
E.E.C., O.E.C.D.



HOLLAND



Holland is a prosperous and important market within the Common Market. The country is compact and well organized for international commerce.

As a record market, too, Holland is important. The expenditure per head of population on records is on a level with that of the United Kingdom and greater than France, Germany and Sweden. Nearly 50% of homes have record-playing equipment and there is a very high proportion of radio receiver ownership.

EMI's associations in Holland since the post-war years have always been mainly with Bovema. Bovema started in a small office with the agency for the Columbia label in 1946. Since that time it has developed enormously. Its headquarters are now the famous Gramophone House at Heemstede where there is a complete pressing plant with extensive matrix facilities, modern recording studios and a lively and aggressive sales and marketing organization. In 1967, EMI obtained a majority shareholding in Bovema. EMI's Dutch company offers not only a highly efficient distribution of the group's international repertoires but has also developed many hits by Dutch artists.

1 Gramophone House, Heemstede, headquarters of Bovema.

2 Patricia, Bovema's new singing star, now beginning an international career after her fine performance at the Knokke Festival 1967.

3 The Shepherds—Holland's foremost folk song trio.

4 Ensemble Benedetto Marcello.

Number of Record Companies 19
Number of Record Pressing Plants 8
Number of Recording Studios 10
Estimated number of Record Players 1,500,000
Total number of Juke Boxes in Operation Approx. 5,000
Estimated value total record sales 1966 £8,400,000 (at retail prices)
Records sold 12 million
Number of Radio Stations 4
Radio Receiver Ownership 95% of homes
Television 2 channels
MISCELLANEOUS
Music Publishers 49 Music Trade Associations 2

SWEDEN

POPULATION
7,773,000 (1966)
AREA
449,793 sq. km.
MAJOR CITIES

Stockholm (capital)	1,193,000
Gøteborg	529,000
Malmø	264,000

POPULATION BY AGE GROUPS (1963)

0—14	1.6 million
15—24	1.2 million
25—49	2.5 million
50+	2.3 million
TOTAL	7.6 million

NUMBER OF FAMILY UNITS
2,776,000
EXCHANGE RATE
£1=14.4 S.Kr.
PER CAPITA INCOME PER ANNUM £810
BLOC MEMBERSHIP
Member of E.F.T.A., O.E.C.D.

The world thinks of Sweden today as an especially progressive country, reflecting an aura of youthful domination and vitality. Sweden has contributed more than its share of motion pictures for world-wide distribution, as well as a multitude of products bearing their special stamp of unique modern design. All this has contributed to the economy and well-being of its people, which has been of special benefit to the record industry, so strongly is it influenced by youthful tastes and enthusiasm. This acceptance of foreign artists and recordings play an important part in the Swedish market, with imports dominating. Low-priced imports are increasing domestic pricing problems, but stimulating overall sales. Jazz finds wide acceptance in Sweden, and the country has contributed artists of international stature in this area, as well as in the classics.

EMI's Swedish company, Electric & Musical Industries Ltd. Svenska AB, has doubled its turnover every year for the past five years. The origins of the company go back to 1903, when the HMV label first appeared. It was that year when the company gave a "gramophone concert" at the Royal Palace before a guest list that included King Oscar II, members of his court, and opera stars such as Caruso and Maria Michailova, as well as Sweden's own John Forsell, celebrated basso. His Majesty wrote an appreciation to the company indicating great interest in ". . . the artistic and technically perfect performance", which was undoubtedly amazing for its time.

Number of Record Companies
Major 3 Others 6 plus a number of smaller labels

Pressing Plants 4
Recording Studios 6

Total Number of Indigenous Labels Currently Active 35

Retail Outlets – About 600
Record Clubs 3

RECORD PLAYERS
Estimated Number of Homes with Players 30%
Number of New Players Annually 100,000

Number of records sold 65/66

7" STD	2,442,342
EP	1,535,037
Low Price LP	186,705
Pop LP	870,799
Classical LP	155,593
TOTAL	5,190,476

In 1966 a total of 6,177,000 records were sold

Retail Value of Records Sold
1966 Sw. Kr. 47,814,000
(at Manufacturers' selling prices)

RADIO BROADCASTING
One Government-owned Station
Receiver Ownership 1965: 86%

TELEVISION
One Government-owned VHF Station
No Colour TV
Number of Families Owning TV – 67% in 1965

PRE-RECORDED TAPE Types Available
4 track in stereo, 2 track in mono
Estimated Number Play-back Units Sold Per Annum 112,000

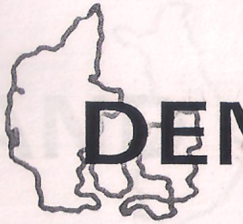
MUSIC (MISCELLANEOUS)
Number of Music Publishers 7 plus a number of smaller houses

Music Trade Associations:
Grammofonleverantorernas Forening (GLF)
IFPI (Svenska Gruppen)

Consumer Periodicals Devoted to Records
1 each for: Classical, Popular, Jazz

Music Licensing Organizations
Nordisk Copyright Bureau (Mechanical)
STIM (Performing Rights)

1 The Headquarters of Electric & Musical Industries Ltd. Svenska AB.
2 Mr. Anders Holmstedt, Managing Director, greeting the distinguished Russian violinist David Oistrakh on a visit to Stockholm.
3 Recording producer and engineer in EMI's Swedish recording studios.
4 Marlene Dietrich and Gitte Heening at a reception in Stockholm.
5 The Swedish artists Sven Bertil Taube and Ingvar Wixell with the golden discs presented to them for outstanding record sales.



DENMARK

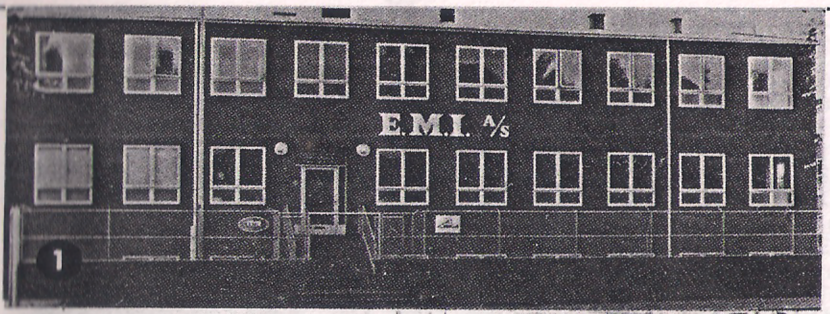
POPULATION
4,774,789 (1966)
AREA 43,043 sq. kms.
MAJOR CITIES

Copenhagen (capital)	1,376,000
Aarhus	186,900
Odense	133,400
Aalborg/Nørresunby	121,200

POPULATION BY AGE GROUPS 1960

0—14	1,000,000
15—24	800,000
25—49	1,500,000
50+	1,400,000
TOTAL	4,700,000

NUMBER OF FAMILY UNITS
(1960) 1,544,370
EXCHANGE RATE (Nov. 1966)
£1 19.3 D.Kr.
PER CAPITA INCOME
PER ANNUM £595
BLOC MEMBERSHIP
Member of E.F.T.A., O.E.C.D.



1 The Copenhagen Headquarters of Electric & Musical Industries (Dansk-Engelsk) A/S.

2 Brian Epstein being presented with a gold disc for the sales of a million units of the Beatles in Denmark, by Mr. S. L. G. Gottlieb, Managing Director of Electric & Musical Industries (Dansk-Engelsk) A/S.

3 A Danish display unit for classical subscription offers.

4 The famous Danish and EMI artist Gitte.

Denmark, although a relatively small country, conjures up visions of outstanding ballet, symphonic performances and a rich musical tradition, centering around the world-famous and delightful Tivoli Gardens in Copenhagen, with its many concert halls and other places of entertainment. It is not surprising, therefore, to find that one-third of all LP records purchased in Denmark are classical, with opera especially popular. This is perhaps one of the highest ratio of classical record acceptances in the world.

In the pop field Denmark's acceptance is international, with artists from England and America dominating. However, domestic teenage artists sales are significant and artists such as Gitte are important far beyond Danish borders.

EMI's record company, Electric & Musical Industries (Dansk-Engelsk) A/S is 63 years old, and has played an important part in the history and development of recorded music in the country, and its acceptance in other important world markets. The Danish record market anticipates continued expansion in the immediate future at a 10% per year increase.

Number of Record Companies
Major 6 Smaller or Independent 5

Number of Pressing Plants 4

Number of Recording Studios 3

Number of Record Labels
Indigenous Labels Currently Active 17

Number of Retail Record Outlets: About 600
Tax is 16⅔% of the Retail Price Including Tax plus 10% tax on value added.
Record Clubs 1 Market Share Est. Less Than 6%

RECORD PLAYERS
Estimated Number of Homes with Players 610,000
Number of New Players Annually Approx. 70,000

JUKE BOXES Approx. 1,100
Annual Gross app. D.Kr. 8 million
3 Major and 15 Smaller Operators

Value of Records Manufactured
1963 D.Kr. 5,500,000 1964 D. Kr. 6,667,000
1965 D.Kr. 7,845,000

Number of Records Sold (1966)
Singles: 1,600,000 EPs: 240,000 LPs: 1,200,000

By diameter	By playing speed
12" 1,100,000	33⅓ rpm 1,200,000
10" 100,000	45 rpm 1,840,000
7" EP 240,000	
7" SP 1,600,000	

Popular LPs 70%

Classical LPs 30%

RADIO BROADCASTING
One Station – Danmarks Radio, Government-owned
Radio Receiver Ownership
1,303,000 Radios, 575,000 Transistor Radios. Sales of Radios 1964 – 204,000

TELEVISION
One Government-owned VHF TV Station
1,030,871 Families own TV – March 1965
TV Sets Sold (1964) 131,000 No Colour TV

PRE-RECORDED TAPE Types Available
Mono and Stereo, 2 and 4 track
Reel-to-Reel and Cartridge
Sales, Recent Year – Estimated 10,000 Tapes Sold
Estimated Number Play-back Units 152,000

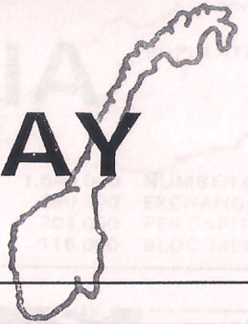
MISCELLANEOUS
Number of Motion Picture Theatres 225
Number of Music Publishers 10

Music Trade Associations
Dansk Grammofonhandler Forbund: Copenhagen
Dansk Musikhandlerforening: Copenhagen

Music Licensing Organizations
Mechanical Rights – Nordisk Copyright Bureau
Performance Rights – Gramex

Trade Periodicals Devoted to Records 1
Consumer Periodicals Devoted to Records 3

NORWAY



POPULATION
3,753,000 (1966)
AREA
324,219 sq. km.
MAJOR CITIES

Oslo*	484,711
Bergen	116,876
Trondheim	111,419
Stravanger	52,031

*Capital

Norwegian fiddlers in national costumes.

POPULATION BY AGE GROUPS (1962)

0—14	0.9 million
15—24	0.5 million
25—49	1.2 million
50+	1.1 million
TOTAL	3.7 million

NUMBER OF FAMILY UNITS 1.2 million
EXCHANGE RATE
£1=19.9 kroner
PER CAPITA INCOME PER ANNUM £522
BLOC MEMBERSHIP
O.E.C.D. E.F.T.A.

Norway is a small market but a prosperous and stable country with a high standard of living. The country is rich in natural resources and hydro-electric power and has about five persons to a telephone and eleven per passenger car.

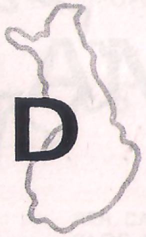
EMI's distributors manufacture in Norway singles, EPs and LPs and also import a considerable amount of material from the U.K. and other continental branches of EMI. They have a healthy local record business and have done much to develop local talent in Norway. They enjoy about 30% of the total Norwegian market.

No. of Record Companies 11
No. of Pressing Plants 5
No. of Recording Studios 4
No. of Juke Boxes in operation 800
No. of Records Sold (1966)

7″ singles	1,900,000
EPs	227,000
LPs	500,000

Value of total retail sales £1,150,000 (1966)
No. of Record Clubs 2
Club sales about 10% of total
RADIO BROADCASTING
1 Government network
TELEVISION
1 Government network
Miscellaneous
Music Publishers 9
Trade Associations:
Record Wholesalers
Record Dealers
Musician's Union
Music Licensing Organizations 2

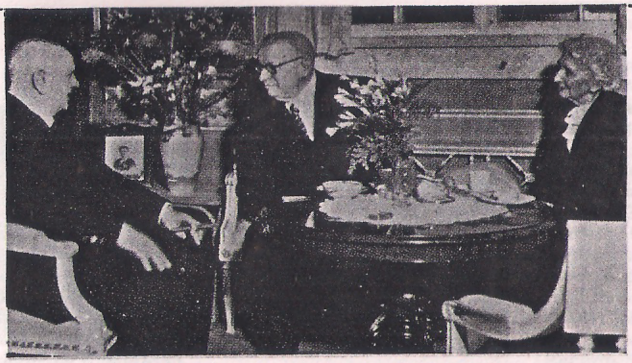
FINLAND



POPULATION
4,626,000 (1966)
AREA
337,125 sq. km.
MAJOR CITIES

Helsinki*	496,000
Tampere	139,400
Turku	138,200

*Capital



Jan Sibelius receives the President of Finland in his home on his 85th birthday.

POPULATION BY AGE GROUPS (1963)

0—14	1.3 million
15—24	0.8 million
25—49	1.4 million
50+	1.0 million
TOTAL	4.5 million

NUMBER OF FAMILY UNITS 1.3 million
EXCHANGE RATE
£1=9.0 Finnmarks
PER CAPITA INCOME PER ANNUM £500

Like Norway, Finland is a small but stable market with a comparable standard of living. The country has two official languages—Finnish and Swedish—and the country has a high standard of literacy supporting no less than 70 newspapers.

EMI's licensees manufacture 45 rpm records in Finland and actively distribute LPs imported from EMI companies in the U.K., Scandinavia and other parts of continental Europe. They are also very active with local recordings of leading Finnish artists.

No. of Record Companies 11
No. of Record Pressing Plants 2
No. of Recording Studios 7
No. of Juke Boxes in operation 2,000
No. of Records Sold (1965)

7″ singles	580,000
7″ EPs	130,000
LPs	170,000

RADIO BROADCASTING
1 Government network
TELEVISION
1 Government network
Miscellaneous
Music Business:
Music Publishers 9
Trade Organizations 4
Music Licensing Organization 1

AUSTRIA

POPULATION 7,290,000 (1966)
AREA 83,849 sq. km.

MAJOR CITIES	
Vienna (capital)	1,640,000
Graz	250,000
Linz	204,000
Salzburg	116,000

POPULATION BY AGE GROUPS (1964)

0–14	1.7 million
15–24	1.1 million
25–49	2.1 million
50+	2.3 million
TOTAL	7.2 million

NUMBER OF FAMILY UNITS (1961) 2.3 million
EXCHANGE RATE £1 = 73 Austrian Schillings
PER CAPITA INCOME PER ANNUM £324
BLOC MEMBERSHIP E.F.T.A.

Gilbert Bécaud at the Columbia retail shop in Vienna. On the right is Mr. Frank Beh, the Managing Director.

Austria, though now a small country geographically, is recognized as one of the music centres of the world. The rich tradition of Viennese music and performers is appreciated everywhere, and today the Vienna Opera and Philharmonic delight music lovers from every part of the globe who visit the country or listen to the many superb recordings available of Viennese artists. Salzburg is perhaps the best known of the major music festivals, spotlighting this magnificent area annually when it presents the world's leading artists, orchestras and conductors.

EMI's company in Austria, Oesterreichische Columbia Graphophon G.M.B.H., is one of the oldest in the country. It has existed in its present form since 1934, surviving the tragic war and post-war years. Today, the company operates large retail stores in Vienna and Salzburg, serves 700 record dealers, and markets its own local recordings as well as various EMI labels.

Number of Record Companies
Major 6, Others 2

Number of Pressing Plants
1 Independent

Number of Recording Studios of Major Record Manufacturers 1
Others 3

Number of Record Labels
Indigenous labels currently active 3
Indigenous labels of major manufacturers 3
Additional foreign-owned labels pressed under licence 66

Number of Wholesale Record Distributors 4

Number of Retail Record outlets 1,700

Number of Record Clubs 5
Total sales about AS 15 million per annum

Estimated number of Record Players 400–450,000
1965 Production 40,000

Number of Records Manufactured
1,600,000 (1965)

Value of Records Sold (at retail prices) 1966
£2,800,000

Number of Records sold (1966)

	000s
7″ Singles	1,630
7″ EPs	331
10″ LPs	20
12″ LPs	784

Mix of Records Manufactured
Popular 60% Classical 40%

Domestic and Export
Domestic (incl. Imports) 95% Export 5%
(Approx. 70% Sales are Imported)

Number of Radio Stations
1 Principal Station Govt. controlled
2 AM Programmes, 1 FM

Radio Receiver Ownership
2,157,329

Television broadcasting of records
1 TV Station Govt. controlled
Total TV Receivers 850,262

Pre-recorded tape. All types available. Annual sales Musicasettes approx. 6,000

Miscellaneous
Music Publishers 120 including 5 major houses
Music Trade Associations 2
Music Licensing Organizations 1
Staatlich genehmigte Gesellschaft der Autoren, Komponisten und Musikverleger

Musical copyrights issued by
Austro-Mechana-Gesellschaft für mechanische Urheberechte, Gmbh

SWITZERLAND

POPULATION 5,945,000 (1965)
AREA 41,287 sq. km.

MAJOR CITIES	
Zurich	439,800
Basle	216,200
Geneva	178,200
Berne (capital)	168,800

POPULATION BY AGE GROUPS (1964)

0–14	1.3 million
15–24	1.0 million
25–49	1.9 million
50+	1.6 million
TOTAL	5.8 million

NUMBER OF FAMILY UNITS (1960) 1.6 million
EXCHANGE RATE £1 = 12.08 Sw. Francs
PER CAPITA INCOME PER ANNUM £695
BLOC MEMBERSHIP E.F.T.A.

Zurich—the Quaibrücke.

Switzerland plays a role in the record business in some respects similar to the part it has played in the economic and political life of Europe. Most records are imported and record companies are few and relatively small. Yet per capita wealth is high, and with foreign interest strong, Switzerland represents an important market from every angle.

Switzerland is, of course, influenced by the French, German and Italian areas touching its borders. Its local music reflects this situation in each area. Foreign records, however, are more widely accepted here than most other countries.

EMI labels account for approximately 27% of the total market. EMI's new company, "EMI Records Switzerland", will handle all company labels, servicing some 900 dealers with a 24-hour service.

Number of Record Companies
Major 9, Others 10

Number of Record Pressing Plants 1

Number of Recording Studios of Major Record Manufacturers 2

Number of Record Labels
About 400 labels in all
(mainly foreign owned)

Number of Retail Record outlets
800–850

Number of Record Clubs 3

Estimated total number of Record Players 1 million

Total number of Juke Boxes in Operation 5–6,000

Number of Records Sold (65/66)

	UNITS
7″ Singles	2,000,000
7″ EPs	1,550,000
10″ LPs	110,000
12″ LPs	1,100,000
Total Sold	4,760,000

RETAIL VALUE (SW. FRS.)

7″ Singles	10,000,000
7″ EPs	11,625,000
10″ LPs / 12″ LPs	26,015,000
Total Sold	47,640,000

Number of Radio Stations
6—Government controlled
(3 German, 2 French, 1 Italian)

Radio Receiver Ownership
1,654,000 (1965)

Television broadcasting of records
No. of receivers 620,783 (1965)

Pre-recorded tape.
Mainly 4 track Stereo Cartridges
Est. sales cassettes approx. 100,000

Motion Picture theatres 643

Music Publishers 5

Music Trade Associations 1

Music Licensing Organizations 1
S.U.I.S.A.

Music copyrights issued by
S.U.I.S.A.

Sales of pianos in 1965 4,700

GREECE

POPULATION
8,540,000 (1965)
AREA
131,944 sq. km.
MAJOR CITIES

Athens (capital)	1,852,709
Salonika	378,444
Patras	102,244
Iraklion	63,458

POPULATION BY AGE GROUPS (1964)

0—14	2.2 million
15—24	1.3 million
25—49	2.9 million
50	2.1 million
TOTAL	8.5 million

NUMBER OF FAMILY UNITS
2,143,000 (1961)
EXCHANGE RATE
£1 84 Drachmai
PER CAPITA INCOME PER ANNUM
£200
BLOC MEMBERSHIP
Associate Member E.E.C.
O.E.C.D.

T.R.H.s The Princesses Irene and Sophia of Greece being presented with an LP of the Greek pianist Themeli on a visit to Columbia's factory in 1959.

Greece has always represented a record market for its own special type of music. It is only in the past decade that the sale of a limited number of imported foreign recordings have reached a point to justify local manufacture. Such records sell almost entirely in the major cities, the rural area remaining faithful to its native music, purchasing records as its low per capita income permits.

Stimulated perhaps by motion pictures such as "Never on Sunday" and "Zorba", Greek music featuring the bouzouki has gained international acceptance. Unlike most countries, in Greece the composer is usually as well known and esteemed as the performer.

Classical records are imported by Greece, as the demand is usually not yet sufficient to justify pressing. Much Arabic music recorded elsewhere is processed in Greece and the records exported all over the world.

Monetary restrictions still exist but, with some limitation, new foreign investments are encouraged and helped. Foreign exchange earnings from tourism continue to increase and a more relaxed monetary situation may be hoped for.

RECORD INDUSTRY STATISTICS

Number of Record Companies
Major 1 Others Approx. 20
Number of Record Pressing Plants 1 (EMI)
Number of Recording Studios 1
Number of Wholesale Distributors 6
Number of Retail Outlets 400—500
Number of Record Clubs 1
Number of Juke Boxes 2,000
Number of homes with record players 140,000 (6.5% families)
Record players manufactured annually 24,000
Number of records sold 1966
Over 4,500,000
7" singles 76%
7" EPs 6%
LPs 18%

Mix of Records Manufactured
Domestic 73%
Export 27%
Greek 65%
Arabic 16%
International 19%

Sales by playing speed
$33\frac{1}{3}$ r.p.m. 5.4%
45 r.p.m. 94.6%

Radio Broadcasting
Number of Stations
10 Government Stations
2 Armed Forces Stations

Tape Estimated number of playback units 30,000

Miscellaneous
Motion Picture Theatres 830 Others 30
Music Publishers 4

Headquarters of the Columbia Graphophone Company of Greece Ltd.

EMI's Greek company, Columbia Graphophone Co. of Greece, Ltd., records and manufactures almost all the records of Greek origin sold in this country. It is also one of the principal manufacturers of Arabic records. The company was established in 1929. The three best-known Greek composers, Hadjidakis ("Sunday"), Theodorakis ("Zorba"), and a talented newcomer, Xarchakos, are all under contract to EMI.

Aliki Vouyouklaki and Bouzouki Group

POPULATION
32,000,000 (1964)
AREA 777,000 sq. km.
MAJOR CITIES

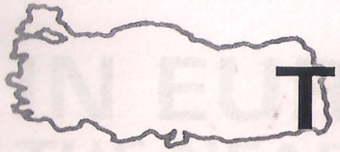
Istanbul	2,500,000
Ankara (capital)	1,000,000
Izmir	700,000
Adana	500,000

POPULATION BY AGE GROUPS (1960)

0—14	11.5 million
15—24	4.6 million
25—49	8.0 million
50+	3.7 million
TOTAL	27.8 million

NUMBER OF FAMILY UNITS 7,500,000

EXCHANGE RATE
£1=25.3 T.L.
PER CAPITA INCOME PER ANNUM £89
BLOC MEMBERSHIP
Provisory Member E.E.C. (Common Market)
Member O.E.C.D.



TURKEY

RECORD INDUSTRY STATISTICS

NUMBER OF RECORD COMPANIES
Major 2 Minor 5

Number of Record Pressing Plants 5

Number of Recording Studios
Major 2 Others 3

Number of Record Labels
Total number of indigenous labels currently active 36
Total number of indigenous labels of major manufacturers 7
Additional foreign-owned labels pressed under licence 15

Number of Wholesale Distributors 32

Number of Record Retailers Approx. 500

Estimated number of record players
Number of homes with players 200,000
Number of new players produced annually 10,000

Total Juke Boxes in operation Approx. 100

Number of records sold 3,000,000 (1966)
Retail value T.L. 30 million

Mix of records manufactured

By playing speed		By diameter	
7″ 45 r.p.m.	97%	7″ 45 r.p.m.	90%
33⅓ r.p.m.	3%	7″ 45 r.p.m. EP	7%
		12″ LP	3%

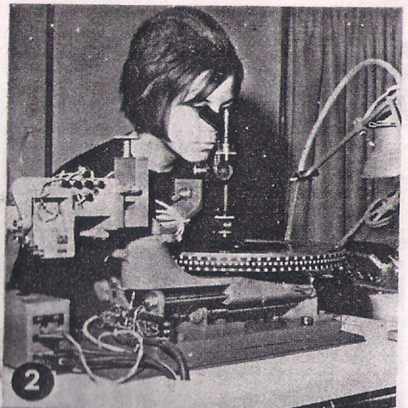
By repertoire
Popular 90% Classical NIL Other 10%
(Only Classical and Educational Records imported)

Radio Broadcasting
Number of Radio Stations 15 Government Stations
Percentage of receiver ownership 3%

Miscellaneous
Theatres Approx. 300
Music Publishers 2
Many magazines and newspapers have record columns

Turkey, with a population four and five times many small European countries, represents perhaps 25% of their sales. The major part of the population is interested in Turkish popular music and classical record sales are not sufficient to justify local pressing. With sales of about 3 million units, it is surprising to find some 36 indigenous labels and a great many foreign labels, all presented by two major and five smaller companies.

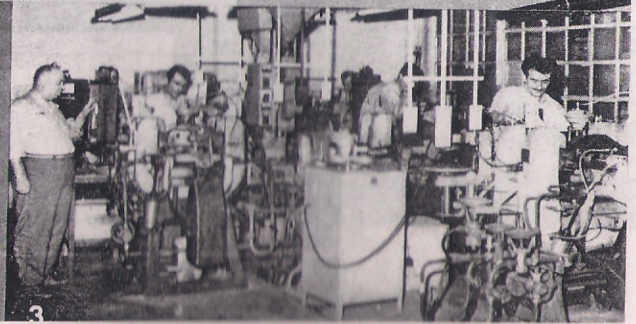
EMI's Turkish company, Gramofon Limitet Sti., currently accounts for 60% of the total records sold in the country. The company goes back to 1923 and presently occupies an elaborate "compound" on the Sea of Marmara, comprising the home of the local manager, the plant and various other buildings housing the company's activities.



1 The main entrance of Gramofon Limitet Sirketi at Yesilköy.

2 Transfer from tape to lacquer.

3 Part of the press room of the Turkish factory.



OTHER RECORD MARKETS IN EUROPE
AND THE NEAR EAST

Space precludes more than a limited treatment of the many other important markets for records in Europe and the Near East including Iceland, Israel, the U.S.S.R., Czechoslovakia, the German Democratic Republic, Hungary, Poland and Jugoslavia and the Arab countries of the Near East.

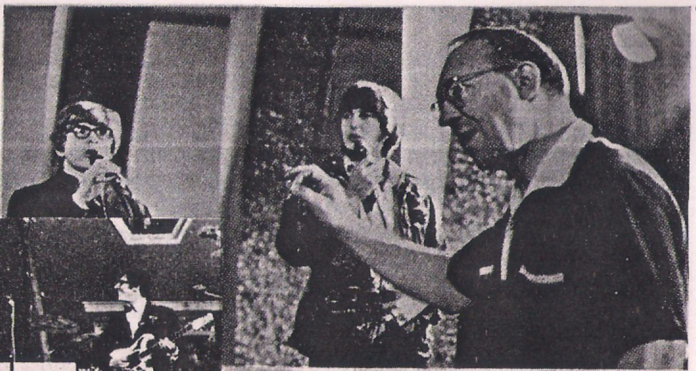
It is often believed that the republics of eastern Europe are closed to the international record industry, but this is far from being the case. Capitol Records Inc. has a very successful agreement with Melodiya, the Russian state recording organization. Russian recordings are sent to the U.S.A. in the form of tapes and transferred and pressed by Capitol, and many of these fine performances are now available on the American market where they have met with conspicuous success.

EMI itself has a very active local pressing and distribution arrangement with Jugoton Records in Jugoslavia. No less than nine artists from EMI companies participated in the 1967 Split Festival—The Shadows from London, the Lords and Heino from Germany, Bjørn Tidmand from Denmark, Gerard Brevant from France, Betina and Georgie Dann from Spain, Jenny Luna from Italy and The Shepherds from Holland. This was the first occasion when the Split Festival became a truly international affair. The EMI artists successfully performed the winning songs and the whole event was televised throughout Eastern Europe. It is hoped that this is only the beginning of a successful collaboration bringing not only Western music to Eastern Europe but East European artists and music to the West.

Likewise, EMI enjoys friendly relations with other Eastern European countries and recording organizations. Peter and Gordon with EMI's Norrie Paramor appeared at the International Festival of Pop Songs at Bratislava, Czechoslovakia, in June 1967, and this too is illustrated on this page. Many successful joint recordings of classical music have been made in association with V.E.B. in Leipzig and Dresden. EMI is very conscious of this important area of the world and is anxious to develop further cultural and commercial relationships with it. The EMI Company in India has extremely active trade associations with all the state record agencies in Eastern Europe. A sizeable and growing finished record export business in America and European recordings into East European countries has been developed by EMI from India in view of the existence of bilateral trade agreements between India and the Socialist countries permitting payment for imports from India in Indian rupees.

Finally, mention must be made of EMI's new pressing factory in Beirut, Lebanon, set up in partnership with Lebanese capital. This factory has recently been built to provide a good service to the Near Eastern markets, where EMI have had long-standing commercial links and where such trademarks as "Voix de l'Orient" and "Voix de Liban" are long established and well known through our associations with the distributor and originators of these repertoires. In the other countries of the region—although recent events have caused some disruption of business—well-established distribution and pressing arrangements are in force and pressings are exported from London and Athens and other EMI companies.

EMI's Norrie Paramor with Peter and Gordon rehearsing for the International Festival of Popular Songs at Bratislava, Czechoslovakia, June 1967.



The Shadows appearing at the Split Festival, August 1967.

Michel Berson, Managing Director of EMI Lebanon, in his office in Beirut.

The record stock room at EMI, Lebanon.

GREENLAND

NORTH AMERICA

CANADA

HAWAIIAN ISLANDS

UNITED STATES

MEXICO

Just as Europe is conceded to be the classical music centre of the world, so America is usually thought of as the cradle of jazz and the popular song.

The turn of the century marked the beginning of a fantastic revolution in popular music. For 40 years, from "Alexander's Ragtime Band" to "South Pacific" and "Oklahoma", the songwriting genius of New York's Tin Pan Alley and the spectacular showmanship of Broadway's Great White Way combined to create a whole new musical heritage, a Golden Age of Popular Song.

During the "Roaring Twenties" and the "Jazz Age" literally hundreds of new musical shows were created for Broadway, featuring the melodies and lyrics of dozens of brilliant young talents, among them Irving Berlin, Cole Porter, George Gershwin, Jerome Kern, to name but a few.

Through the medium of sheet music, road shows, records, movies, radio, the live performance of innumerable dance bands from Paul Whiteman to Glenn Miller, and soloists from Al Jolson to Bing Crosby, America's 20th century musical revolution swept the world, abetted in great part by the earth-shrinking impact of two world wars.

Although today America no longer retains this monopoly, its "standards" live on in the repertoire of artists in every country. Dozens of American popular artists like Benny Goodman, Louis Armstrong, Perry Como, Guy Lombardo, Frank Sinatra, etc. are well known and popular everywhere.

The influence of New Orleans' jazz, of the Nashville "Country and Western" sound, and the impact of Hollywood and Broadway's top musical product ("Sound of Music", "Hello Dolly", etc.) continue to make America a major creative factor in entertainment and recorded sound, besides being in itself the biggest buyer of entertainment in the world.

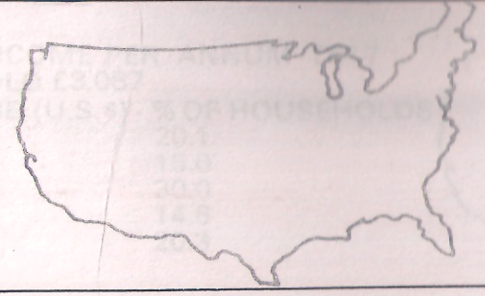
As a melting pot of many cultures . . . Spanish, English, French, Latin, German, Irish, Oriental and African . . . North America's virile and extraordinary musical contributions are perhaps only a natural expression of its rich heritage of freedom and unlimited creativity.

EMI moved into the North American consumer market in a really big way in 1955 with the purchase of over 90% of the stock in Capitol Records. Capitol, then only 12 years old, was already one of the top three U.S. record companies and was building as its headquarters the world's first circular office building at Hollywood and Vine in Hollywood (shown below with Capitol's founder Glenn E. Wallichs).

One of the two planeloads of winners in the Capitol Records Distributing Corporation's 1964/65 "Hawaii" Sales Contest, photographed on arrival at the Honolulu airport. Winners included Capitol salesmen and dealers. A similar sales contest in 1965/66 featured a trip to Spain and the Majorca Islands.

Winners in the Capitol Record Distributing Corporation's 1966/67 "Orient" Sales Contest, photographed in Kyoto, Japan, with their wives and local entertainers. Winners included top Capitol sales personnel and retailers.

UNITED STATES
OF AMERICA



POPULATION 200,783,000 (estimated 1967)
AREA 9,363,394 sq. km.

MAJOR CITIES	
New York	8,006,000
Chicago	3,537,000
Los Angeles	2,768,000
Philadelphia	2,054,000
Detroit	1,598,000
Houston	1,135,000
Washington (capital)	807,000

The United States of America represents a tremendous market for practically everything . . . and records are no exception! This is due, in part, to a population of over 200 million, the world's highest per capita income, and around 30 million teenagers with spending money and a great fondness for their special kind of music. Retail sales in 1966, for example, hit $892 million, and each year seems to show substantial increases. Phonograph sales, representing new buyers, topped 6 million instruments in 1966.

Measure any aspect of the business and the numbers are *large*. Annual album sales, over 680 million dollars . . . singles, maybe, over 200 million dollars. EPs are a rarity in the U.S. today, hardly measurable.

Sounds wonderful, and it is in many ways . . . until one realizes that the competitive situation in the U.S.A. is probably the keenest in the world. Approximately 3,000 record companies are listed by the American Federation of Musicians, with no measure of their size or rate of activity. An industry record catalogue lists 1,700 separate labels (Phonolog). There are 5,748 radio stations, with around 18,000 disc jockeys spinning selections from the 10,000 different records that are issued annually. Records are available to the public through around 12,000 record stores and endless thousands of other outlets served by rack dealers, such as drug stores, supermarkets and other "traffic centres". In the pop singles end of the business sales are largely controlled by the "top 40" selections of various disc jockeys and stations, with fairly rigid government controls on the authenticity of accuracy of their selectivity.

1

From one point of view one might say that the record business in the United States is a mess, and a big one at that! Understanding the business calls, to some extent, for understanding the country and the American way of doing business. Here, business operates pretty much on a "survival of the fittest" basis, and "survival" demands a product at least as good as its competitors and a price at least as low. Discounting of all products, especially records, is rampant, with any attempt by a manufacturer to control retail price *illegal*

All this suggests that getting a share of the U.S.A.'s vast record market calls for special knowledge and specialized help. *It does.* The selection of the right record company is perhaps more essential here than anywhere in the world.

The "Big Three" companies in the U.S. are Capitol, CBS (Columbia), and RCA (Victor). There are perhaps ten additional large companies doing substantial business, and a multitude of small ones, where volume and influence vary with their current hits, or lack of them.

The "Big Three" each release about the same number of records per year . . . totalling 1,200 LPs and 1,400 singles, representing 30% and 20% of the country's LP and single production. (The industry issues approximately 4,000 LPs and 7,000 singles annually.) Obviously only a small fraction of this vast number of singles ever earn back their production cost, and a smaller number

Number of Record Manufacturing Companies
Major 13 Others 40 of significant size. Several thousand very small
Number of Record Pressing Plants of Major Record Companies 13
Number of Record Pressing Plants of Other Record Companies 87
Number of Recording Studios of Major Record Manufacturers 16
Number of Recording Studios of Other Record Manufacturers (including film studios often used for recording) 137
Number of Record Labels: Indigenous labels currently active about 1,700 in all, of which 200 periodically reach major charts
Number of Wholesale Record Distributors 400
Number of Retail Record Outlets 7,800 Record Stores
3,100 Department and Discount Stores 38,000 Other Outlets
Number of Record Clubs 3 Major Several small
Estimated 1966 sales Major $100,000,000 Others $10,000,000
Number of Rack Jobbers 215 Rack Jobbers 252 One-stop Operators
Estimated Number of Record Players 42 million
Annual sale Approximately 6 million
Homes with players Estimated 35 million % Stereo players 60—65%

Total Number of Juke Boxes in operation 440,000
Annual record purchases $39 million or 4.4% of total U.S. sales

Records sold (excluding exports and premium records)	Year	Units (millions)	Retail Value (million $)
	1962	401	651
	1963	408	658
	1964	421	693
	1965	477	789
	1966	537	892

Mix by diameter	Mix by playing speed
7" 52%	45 rpm 52%
12" 48%	33 rpm 48%

Sales by outlets (1966)	$ million	%
Dealers	372	41.7
Racks	365	40.9
Juke Boxes	39	4.4
Clubs, Mail Order	116	13.0
TOTAL	892	

Mix of Records Manufactured Popular 93% Classical 7%
Domestic Sales (1965) $789 million Export Sales $33 million

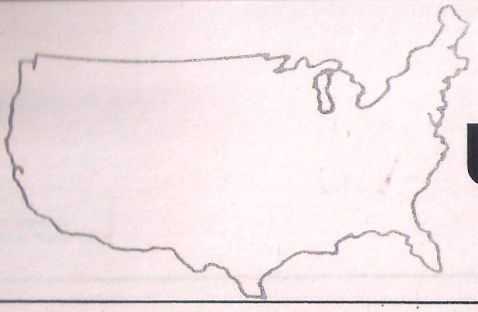
POPULATION BY AGE GROUPS (1965)

0—14	59.9 million
15—24	30.7 million
25—49	58.3 million
50+	45.7 million
TOTAL	194.6 million

NUMBER OF FAMILY UNITS
57,820,500 (1960)
EXCHANGE RATE £1 = $ 2.80

PER CAPITA INCOME PER ANNUM £917
PER HOUSEHOLD £3,087

FAMILY INCOME (U.S. $)	% OF HOUSEHOLDS
0—2,499	20.1
2,500—3,999	15.0
4,000—6,999	30.0
7,000—9,999	14.6
10,000 and over	20.3



U.S.A.

achieve hit status. LPs, as in most countries, are somewhat different, with show albums, "standards", and similiar productions sprinkled among the hit LP list along with the more spectacular LPs developed frequently out of hit singles.

Proper exploitation is, of course, an essential ingredient to achieving a hit, although there are exceptions, when the song is a real "grabber" . . . like Sukiyaki, sung in Japanese by Kyu Sakamoto, a teenager unknown in America. (The record sold over a million in a very few weeks.) The invasion of the Beatles is now historical, establishing a beach-head for the "English" sound, and opening a whole new era for foreign artists and records. Today, hit records come from many sources, with local artists regaining leadership, but artists from as far away as Australia registering strong sales.

In the U.S.A., as in no other country, distribution and sales facilities are vital to success. This vast area of over 3,600,000 square miles calls for many sales and distribution points for fast delivery of hit records *when they are hot.* Factories, too, must be strategically placed; Capitol, for example, has three: one on the east coast, one on the west coast, and a third in the centre of the U.S. turning out literally millions of records a month.

Summing up, things may be done in a big and sometimes brash way in America. But the rewards, too, are big, and in the record business the U.S.A. offers at least half of the entire world's market.

1. Alan W. Livingston, President of Capitol Records, welcomes Capitol's newest singing sensation, Bobbie Gentry, at the 25th Anniversary celebration at Capitol Tower, Hollywood, September 17, 1967.

A FEW OF CAPITOL'S TOP RECORDING ARTISTS: 1. Al Martino 2. The Beach Boys 3. Nancy Wilson 4 Peggy Lee. 5. Matt Monro 6. The Beatles 7. Wayne Newton 8. Lou Rawls 9. The Lettermen 10. Tennessee Ernie Ford 11. Buck Owens 12. Ella Fitzgerald 13. Bobbie Gentry 14. Teddy Neeley 15. Cannonball Adderley 16. Glen Campbell.

Number of Radio Stations (1966) 4,117 AM, 1,631 FM, TOTAL 5,748
Radio Networks NBC (RCA), CBS, ABC, Mutual
Record Playing Time 80%
Approximately 18,000 Disc Jockeys programme popular records

Radio Receiver Ownership estimated 250 million radios in use (including car radios) 99.3% of homes have one or more radio
Average American listens 17.5 hours per week

Television broadcasting of records

Number of stations	VHF	UHF	TOTAL
Commercial TV stations	478	92	570
Educational TV stations	60	41	101
	538	133	671

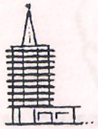
TV networks, ABC, CBS, NBC 88 million TV sets in use (1966)
97.1% of homes have one or more black and white sets
Colour TV National network shows almost all in colour (except black and white films and live news coverage)
Estimated 10 million families have colour TV sets (April 1967)
1966 Colour TV sales were 40% of all sets sold

Tape Estimate 1966 sales		
	Open reel tapes	$13,800,000
	Cartridge tapes	$15,500,000
	TOTAL	$29,300,000

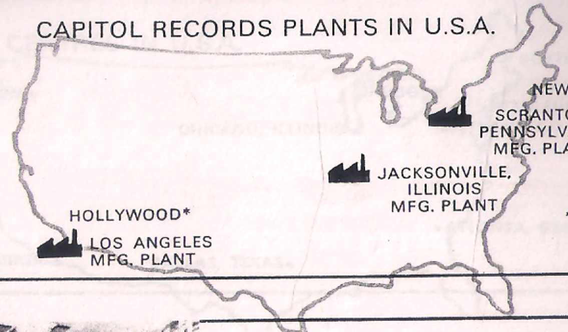
1967 sales may reach $50 million at retail prices
Tape playback units 1965 sales 3.7 million units (3 million imported)

MISCELLANEOUS
Music Publishers 5,050 (of which approx. 200 dominate the recording field)
Music Trade Associations 92 (see Billboard Directory—August 19, 1967, page 134)
Music Licensing Organizations 10 including ASCAP, BMI, Harry Fox, SESAC
Musical Copyrights issued by U.S. Registrar of Copyrights
Sheet Music Sales Est. $40 million (large part for educational and professional use)
Piano, Organ, Musical Instrument Sales
Estimated at $955 million at retail (1966)
Trade periodicals devoted to records 3
Catalogues (Phonolog, Schwann) 2 Consumer Periodicals 8
Theatres: Motion pictures including drive-ins Estimated 13,100
Others (legitimate including concert halls) Estimated 3,200

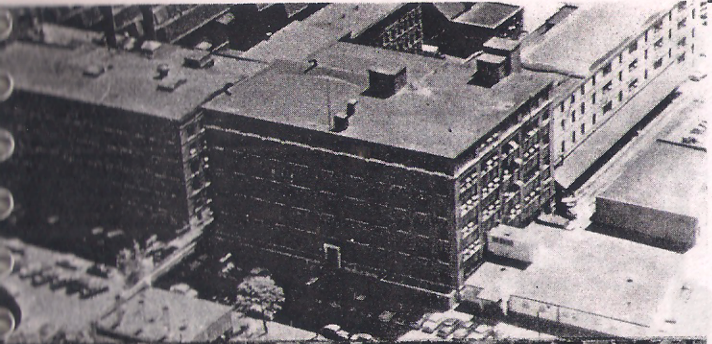
U.S.A.

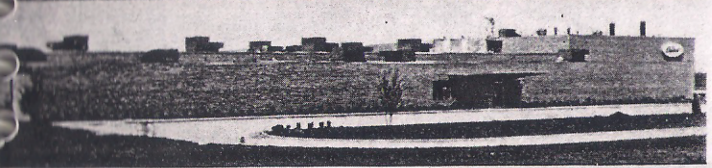


THE CAPITOL TOWER



*Executive offices and recording studios in Hollywood, California and New York City





CAPITOL RECORDS INC.

EMI's company in the United States is Capitol Records, Inc. Capitol was purchased by EMI in 1955, when it became the largest link in EMI's world-wide chain of top record companies. Since that time Capitol sales have quadrupled, with a proportionate increase in assets. Today, Capitol stands as one of the largest and most powerful record organizations in the United States and throughout the world.

From its earliest days Capitol has always owned and operated its own sales and distributing organization. The country is divided into five divisions, with over 300 salesmen servicing 4,600 larger dealers and 400 sub-distributors (one-stops, racks, etc.).

Three large and ultra-modern pressing plants serve these distribution centres—one on the east coast, in Scranton, Pennsylvania; the mid-west in Jacksonville, Illinois; and on the west coast in Los Angeles.

Headquarters for the company are in the famous Capitol Tower, Hollywood's round building that is known throughout the world. There are executive offices in New York and Nashville, and recording studios on both coasts.

1 Aerial view of Capitol's factory at Scranton, Pennsylvania.

2 Capitol's newest factory at Jacksonville, Illinois, in the centre of the U.S.A. is completely air-conditioned and equipped entirely with automatic presses, automatic compound resin-blending and material-handling systems. It covers 100,000 sq. ft., cost $2.5 million and is operated on a three-shift basis.

3 Capitol's Jacksonville, Illinois, factory.

4 Where it all began: the original Music City Store at Sunset and Vine with the early Capitol Records headquarters office on the second floor.

5 The Capitol of the World Market Spotter, showing the location of the main immigrant communities in the United States.

6 Capitol's Los Angeles factory.

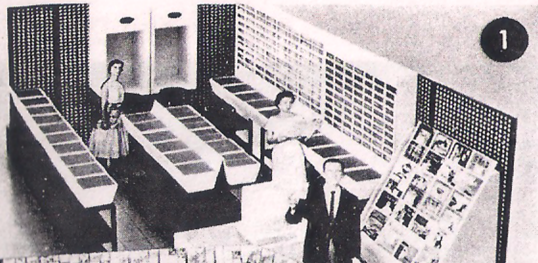
7 Interior of one of the five Music City retail record shops in the Los Angeles area. The Music City shop at the corner of Sunset and Vine in Hollywood is unique. Its listening booths which face on the Sunset Boulevard windows are packed with teenage listeners until 2 a.m. seven days a week.

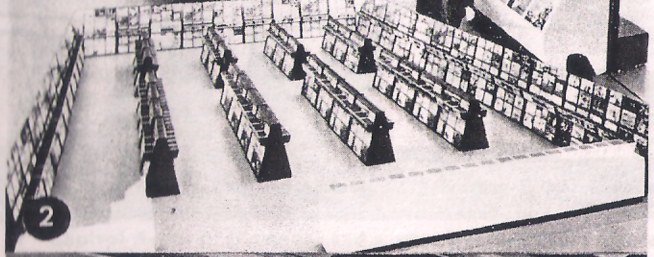
U.S.A.

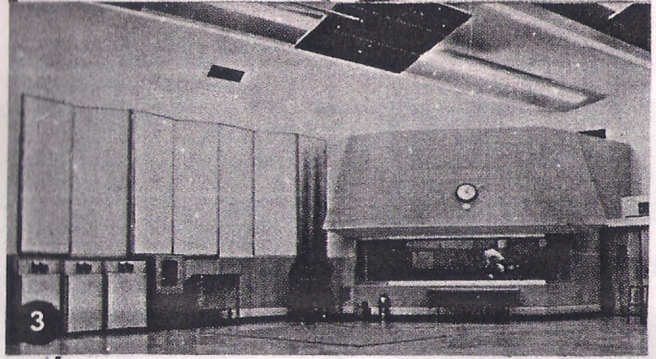
CAPITOL RECORDS DISTRIBUTION CENTRES IN U.S.A.

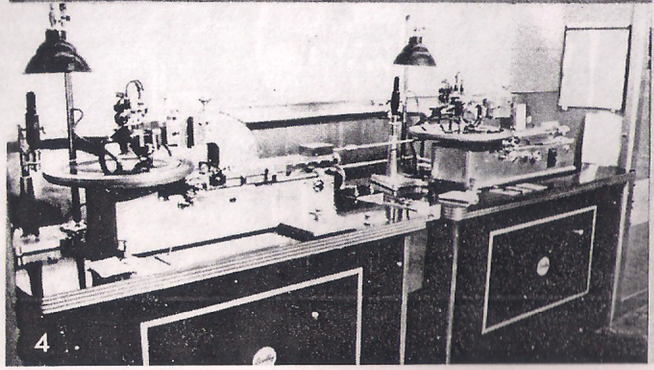
Sales offices in following additional cities: New York, Philadelphia, Baltimore, Washington, D.C., Cincinnati, Kansas City, San Francisco, and Miami

Independent distributors in Denver, Billings, Honolulu









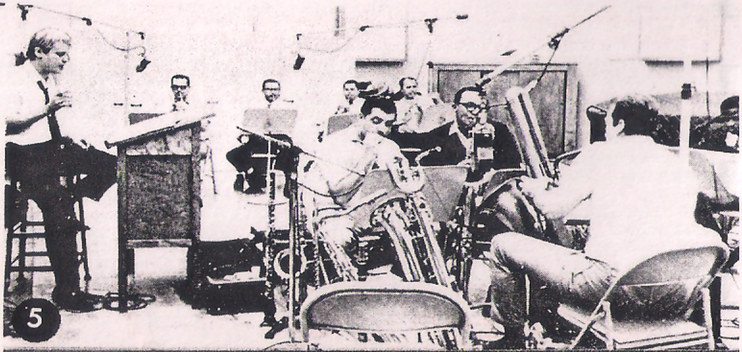
Capitol has always been in the forefront of new developments. It was the first recording company to adopt the technique of magnetic tape recording—the first to release records on three speeds—the first to use four-colour photographs on album covers. Combining its own research organization with the vast facilities of EMI, the companies have produced many breakthroughs in sound recording and reproduction.

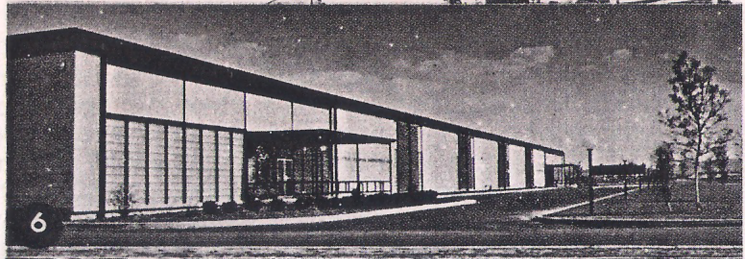
Capitol led the field in hit single records for 1966, as measured by the Record Industry Association of America, which awards gold records for over one million sales. Capitol received twice as many as its nearest competitor.

Record clubs are an important sales outlet in the U.S.A., accounting for over a hundred million dollars annually and offering an attractive source for additional sales and income to artists. Capitol operates one of the two largest record clubs in America. More complete details on this and other EMI record clubs may be found in another portion of this book.

Tower Records, a subsidiary of Capitol, was formed a few years ago with the objective of developing relatively unknown artists into the hit category. The company operates completely independently in every aspect of its business, and in its brief history has developed a half-dozen hit artists as well as several hit soundtrack albums, all in the teenage category. The company records its own artists and also purchases masters through independent producers.

Capitol was the first major label to be released throughout the world under its own label. As a result it is known throughout major marketing areas, where it continues to offer best-selling albums and singles.





1 & 2 Self-service merchandising. For over 15 years Capitol Records has been providing record retailers with innovations in self-service selling. Many of the fixtures and devices that are now standard equipment in record stores were created and promoted by Capitol's merchandising staff. In addition, Capitol provides concrete assistance to dealers who are planning to remodel or to open a new store. Actual scale models are arranged to meet the specifications and requirements. They are then photographed and the pictures and accompanying recommendations forwarded to the dealer. Above are two such examples, one of a plan for a new record department, the other for a complete new record store.

3 One of the large recording studios in the Capitol Tower, Hollywood, showing control room and the acoustically versatile walls and ceiling.

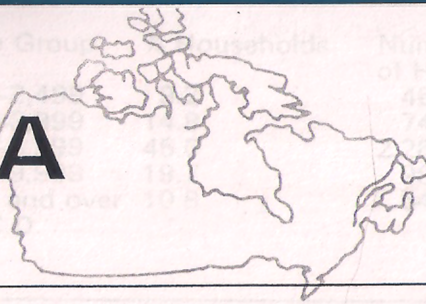
4 Original master tape signal being transferred to lacquer discs by a pair of Scully lathes. On a 12-inch record the spiral groove may be nearly a half-mile long. From these master discs the factories produce the matrices from which the metal dies are made for the automatic presses.

5 David McCallum, the famous television personality, recording in Capitol's Hollywood studios.

6 Capitol Records Distribution Centre at Bethlehem, Pennsylvania, typical of Capitol's several major warehouse depots serving the U.S.A.

7 Part of Capitol's 86,000 sq. ft. depot at Bethlehem, Pennsylvania, serving Eastern U.S.A.

CANADA



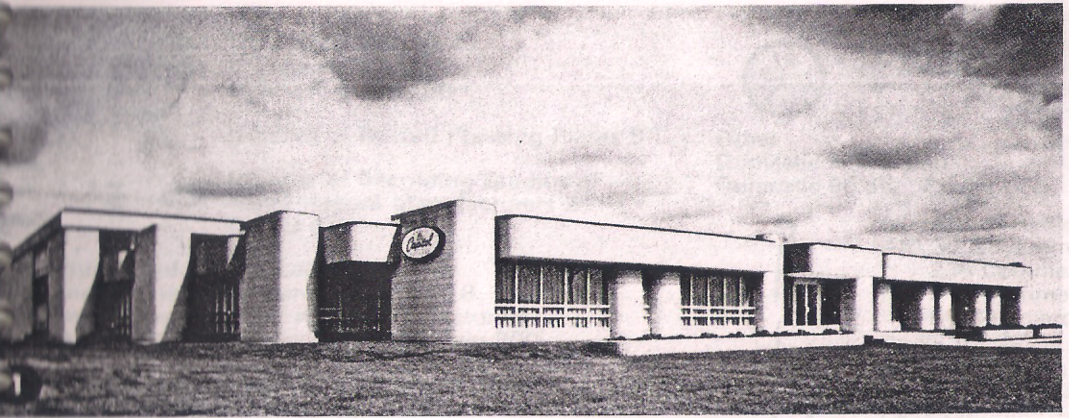
POPULATION
20,015,000 (est. 1967)
AREA
9,976,172 sq. km.
MAJOR CITIES

Montreal	2,419,000
Toronto	2,145,600
Vancouver	884,100
Winnipeg	505,300
Ottawa (capital)	489,400

POPULATION BY AGE GROUPS (1965)

0—14	6.5 million
15—24	3.3 million
25—49	6.0 million
50+	3.9 million
TOTAL	19.7 million

NUMBER OF FAMILY UNITS 5,005,000
EXCHANGE RATE £1=3 Canadian Dollars
PER CAPITA INCOME PER ANNUM £645



1 Capitol Records (Canada) Ltd's. new headquarters at Malton in suburban Toronto, Ontario.

2 A window display featuring Franco Corelli, during the artist's appearance in Canada

3 Tennessee Ernie Ford at a reception held by Capitol in Ottawa.

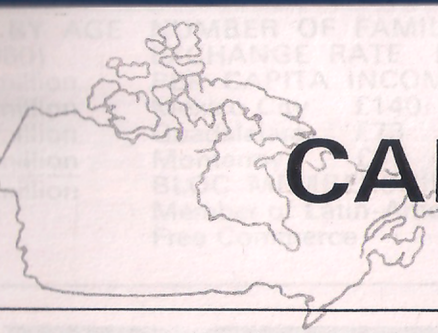
Canada is a huge area geographically, slightly larger than the United States, but with 10% of the U.S. population. Particularly in recent years, the country is expanding and prosperous, with a per capita income of about $2,000, and per capita record purchases almost paralleling U.S. Musically, the country has been strongly influenced by the United States, as radio stations in cities like Buffalo, Chicago, Seattle, etc. transmit the "Top 40" across the border. Major record companies, also, are subsidiaries of U.S. firms, promoting and distributing their records.

Today, a trend towards more independent operation can be noted, particularly in the eastern area (Montreal, Quebec) where French is spoken and French music of local origin dominates air play and sales. Canadian teenage artists are also increasing in importance and gaining acceptance outside Canadian borders. English artists captured a large part of the Canadian youth market even before they invaded U.S., and continue to play an important part in sales, although a tapering off seems to be indicated.

Of the five million family units in Canada, more than half now own one or more record players, spending about 60 million dollars annually for records, produced by seven major record companies and 30 smaller ones.

EMI's company in Canada was founded in 1949, and has developed to a top position in the industry, doing about a quarter of all the business. Headquarters are in Capitol of Canada's new building in Toronto, with branches throughout the country.

The French-Canadian market is served by Capitol from its Montreal offices. Local artists are signed to produce French records, and records are both imported and pressed from EMI's French company, Pathé-Marconi.



CANADA

FAMILY INCOME (Canadian Dollars)

Income Group	% Households	Number of Households
—2,499	9.2	460,000
2,500—3,999	14.8	740,000
4,000—6,999	45.6	2,280,000
7,000—9,999	19.7	985,000
10,000 and over	10.8	540,000

BLOC MEMBERSHIP O.E.C.D.

Number of Record Companies
Major 7 Others 30

Number of Record Pressing Plants 8

Number of Recording Studios of Major Record Manufacturers 2
Others 9

Number of Record Labels
Indigenous labels currently active 18
Indigenous labels of major manufacturers
Additional foreign-owned labels, over 300

Number of Wholesale Record Distributors 73

Number of Retail Record outlets 2,000 retail plus 3,000 rack outlets

Number of Record Clubs 3
(1965 sales Can $3,900,000 at distributors' prices)

Number of Rack Jobbers 15

Estimated number of Record Players: 3,024,000 homes with players and approx. 3,650,000 in use

Retail Value of Records Sold	000 Canadian $
1962	$34,000
1963	$44,000
1964	$48,500
1965	$54,000
1966	$59,000

Number of Records Sold	000's
1962	21,481
1963	26,983
1964	26,185
1965	28,117
1966	34,193

Records Manufactured 1966
By diameter

7"	17,135,000
12"	23,141,000
Other	24,912

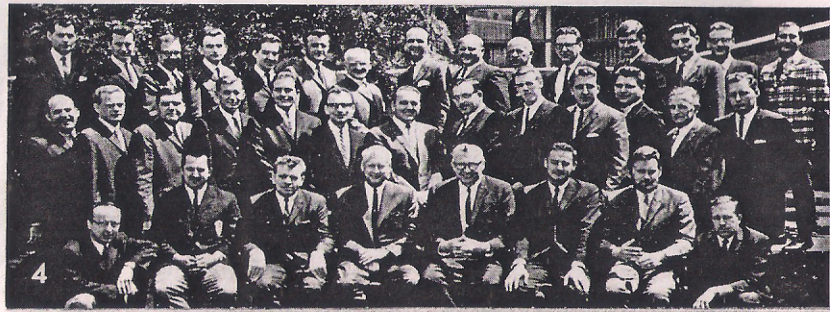
Domestic and export
Domestic 99.8% Export .2%

Number of Radio Stations
AM 30 Government owned
236 Commercial
FM 5 Government owned
51 Commercial

Radio Receivers 10,000,000
(incl. Transistors and Car Radios)

Television—1 VHF Government Channel
57 VHF Commercial Stations
CFPL, CHSJ, CBLT—CBC Network, CRFN, CFCF, CFTO—CTV
1.6 million families have colour TV

Miscellaneous
Number of Motion Picture Theatres 1,451
Number of Music Publishers 70
Music Trade Associations
Canadian Record Manufacturers Association
Toronto Musicians Association
Canadian Music Centre—Toronto
Music Licensing Organizations
B.M.I. C.A.P.A.C.
Musical Copyrights issued by:
Copyright Government office



4 1966 National Sales Convention of Capitol Records (Canada) Ltd.

5 Al Martino takes time out to catch up on the trade papers during a Canadian club appearance. With him Canadian Cashbox reporter John Murphy and Paul White, Director of A & R.

6 The leading Canadian country singer, Garry Buck, signing a contract with Capitol Records (Canada) Ltd. On the left is Paul White, Director of A & R and on the right is G. Edward Leetham, Vice-President and General Manager.

MEXICO

POPULATION
41,460,000 (1966)

AREA
1,972,547 sq. km.

MAJOR CITIES

Mexico City*	5,665,000
Guadalajara	1,025,000
Monterrey	801,000

*Capital (population includes suburbs)

POPULATION BY AGE GROUPS (1960)

0—14	15.5 million
15—24	6.5 million
25—49	9.1 million
50 +	3.8 million
Total	34.9 million

NUMBER OF FAMILY UNITS 6.4 million

EXCHANGE RATE £1=34.84 pesos

PER CAPITA INCOME PER ANNUM

Mexico City	£140
Guadalajara	£73
Monterrey	£37

BLOC MEMBERSHIP
Member of Latin-American Association of Free Commerce

Mexico is justly proud of the fact that it offers the soundest money in Latin America. For some years the peso has maintained its value and is accepted everywhere in the world as "hard currency". Money may be invested in Mexico and profits, or the entire capital, withdrawn without penalty or restriction. This obviously creates an encouraging climate for foreign investment and business development, particularly since Mexico offers a larger "middle class" market, whose *per capita* wealth is growing.

Musically, Mexico has for perhaps centuries been devoted to its own special kind of instrumentation and songs . . . mariachis, rancheros, etc. But much of this music has spread out and become popular throughout the world, and even in far-off Japan the infectious styles and rhythms of Mexican groups are meeting with enthusiastic approval.

Mexico's big neighbour to the north, the United States, exerts some influence on Mexican music, and some of its artists gain substantial sales and acceptance when material has genuine potential and is properly presented and exploited.

Mexico has several large cities, offering big market centres, but Mexico City D.F. itself contains 13% of the population and a substantially larger share of *per capita* wealth. It is a beautiful city, as cosmopolitan as London or Paris, and reflecting many cultures, especially French and Spanish. Guadalajara is the second largest city, which is growing rapidly under the influx of tourists and business expansion.

EMI's record company in Mexico is "Discos Capitol de Mexico", located in the heart of the music centre in Mexico City. While the company records local music of all types, much of its present efforts are devoted to the exploitation of *"foreign"* repertoire from its EMI affiliates throughout the world.

Summing up, Mexico is a country of great charm, colour and business opportunity. Every year sees further development and improvement and its future holds great promise of the country becoming a world force in marketing.

1 Sir Joseph Lockwood, Lloyd Dunn, the Vice-President International of Capitol Records Inc., Hollywood, together with principal executives of Discos Capitol de Mexico.

2 The Mexican group Los Yakis.

3 Andrik.

Number of Record Companies
Major 8 Others 7

Number of Record Pressing Plants 8

Number of Recording Studios of Major Record Manufacturers 11
Number of Recording Studios of Other Record Manufacturers 9

Number of Record Labels
Indigenous labels currently active 13
Indigenous labels of major manufacturers 11
Additional foreign-owned labels 80

Number of Wholesale Record Distributors 1

Number of Retail Record Outlets 640

Number of Record Clubs 5

Estimated number of Record Players 1,200,000
Sold per year 75,000

Total number of Juke Boxes in operation 19,000

Record Industry Sales (1966)	Value (£s)
LPs	4,400,000
EPs	1,650,000
Singles	850,000
Total	£6,900,000

Mix of Records Manufactured
Popular 93% Classical 7%

Domestic and Export—Domestic 81% Export 19%

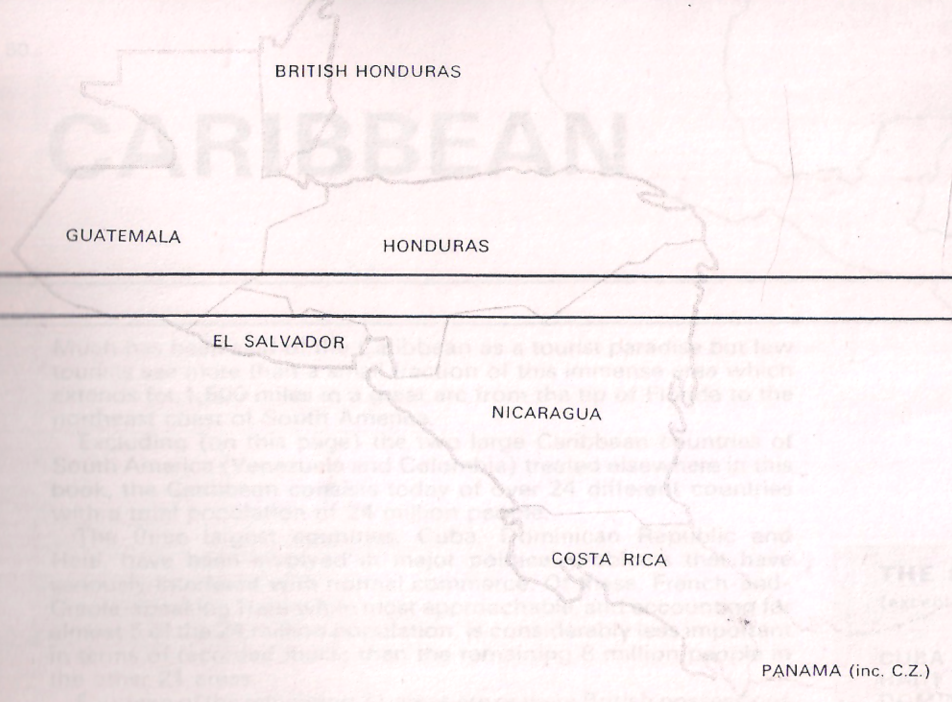
By diameter		By playing speed	
7″	64%	78 rpm	5%
10″	5%	45 rpm	64%
12″	31%	33 rpm	31%

Number of Radio Stations 450 all privately owned
Record Playing Time 70%

Radio Receiver Ownership 4,400,000 (Approx. 58.4% of homes)

Television broadcasting of records—12 TV stations—32 channels
Number of Families with TV set 800,000
Approx. 150,000 sold per annum

MISCELLANEOUS
Motion picture theatres 2,000
Number of Music Publishers 21
Music Trade Associations AMPRODIS (Manufacturers) S.U.T.M.
Music licensing organization S.A.C.M.
Musical Copyrights issued by Secretaria de Educacion Publica (Mexican Dept. of Public Education)



CENTRAL AMERICA

POPULATION 14,145,000 AREA 532,813 sq. km.

South of Mexico between the Pacific Ocean and the Caribbean are the seven countries of Central America, six of them independent Latin-American republics, the seventh the small but important British Commonwealth colony of British Honduras.

Air routes and the nearly completed Pan-American highway have helped to increase trade with Mexico, the United States and neighbouring South American and Caribbean countries. A Central American Common Market is beginning to function and there is much evidence of economic growth.

During the past few years several modern record manufacturing plants have been established to augment the import of records from Britain, the U.S., Mexico and South America and to make possible greater promotion of local artists as well as better distribution for imported product.

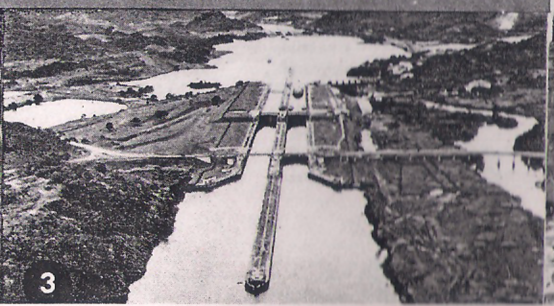
Central American recording artists tour other Latin-American countries and their work has also appeared on various U.S. labels.

EMI product and artists are well known in this area, including those of Capitol (U.S.), Capitol de Discos (Mexico) and EMI-associated record companies in Brazil, Argentine, Chile and Peru, via both imports and licensed pressings made in Nicaragua.

Data on the local record industry in these countries is sparse. There are two record manufacturers in Guatemala and El Salvador and an EMI Licensee and Manufacturing Associate in Nicaragua. Guatemala, El Salvador, Honduras and Panama have radio networks. Nevertheless these countries are well serviced with EMI records from the U.S.A., Mexico and other South American associate companies.

THE SEVEN COUNTRIES OF CENTRAL AMERICA (listed in order of population)

COUNTRY	POPULATION (1966)	CAPITAL CITY & POPULATION		PER CAPITA INCOME PER ANNUM	EXCHANGE RATE
GUATEMALA	4,646,000	Guatemala City	573,937	£89	£1=2.8 quetzals
EL SALVADOR	3,037,000	San Salvador	300,000	£79	£1=7.0 colons
HONDURAS	2,363,000	Tegucigalpa	171,000	£72	£1=5.6 lempira
NICARAGUA	1,685,000	Managua	249,000	£105	£1=19.6 cordobas
COSTA RICA	1,502,000	San José	174,000	£67	£1=18.5 colons
PANAMA (inc. C.Z.)	1,343,000	Panama City	331,000	£143	£1=2.8 balbao
BRITISH HONDURAS	109,000	Belize	33,000	Not available	£1=4 Honduras $



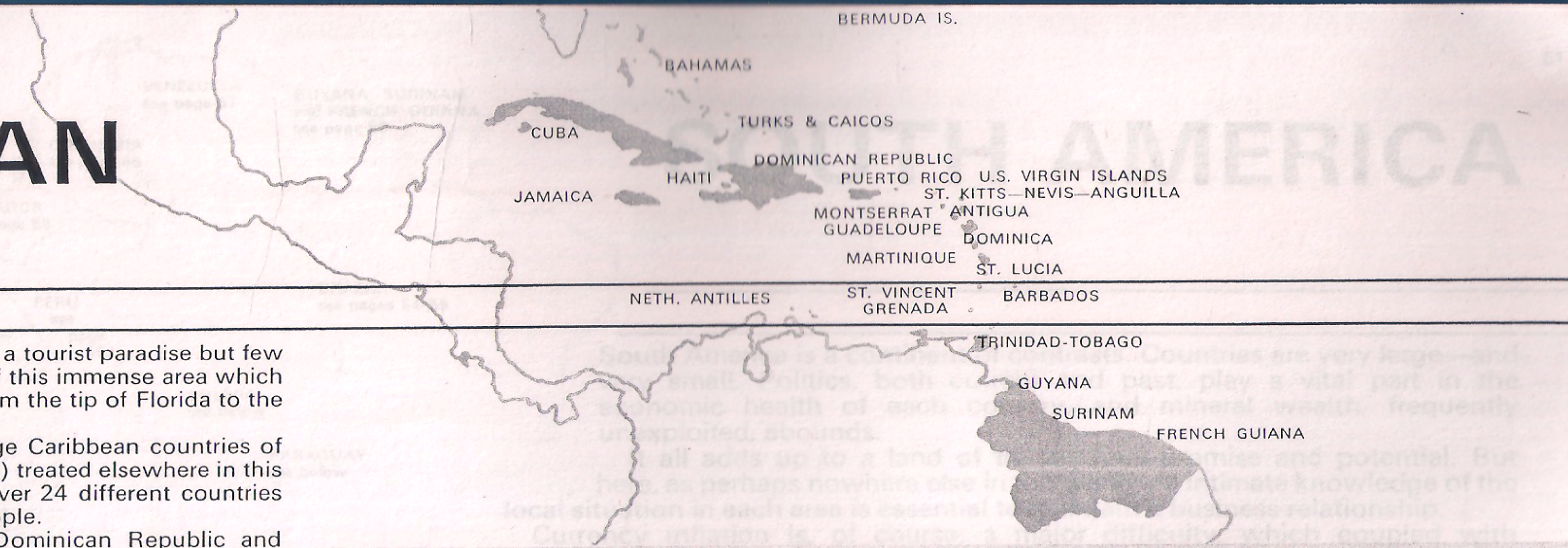
1 Replica of a Mayan Temple in Tegucigalpa, capital of Honduras.

2 Holy Week processions in Guatemala.

3 The two-step Miraflores locks on the Panama Canal.

4 The cathedral of Santa Ana, El Salvador.

CARIBBEAN



Much has been said of the Caribbean as a tourist paradise but few tourists see more than a small fraction of this immense area which extends for 1,500 miles in a great arc from the tip of Florida to the northeast coast of South America.

Excluding (on this page) the two large Caribbean countries of South America (Venezuela and Colombia) treated elsewhere in this book, the Caribbean consists today of over 24 different countries with a total population of 24 million people.

The three largest countries, Cuba, Dominican Republic and Haiti, have been involved in major political problems that have seriously interfered with normal commerce. Of these, French-and-Creole-speaking Haiti while most approachable, and accounting for almost 5 of the 24 million population, is considerably less important in terms of recorded music than the remaining 8 million people in the other 21 areas.

Fourteen of the remaining 21 areas are or were British possessions and two more U.S. domain, so that 16 of these markets are English-language oriented and a natural market for British and U.S. products including recorded entertainment.

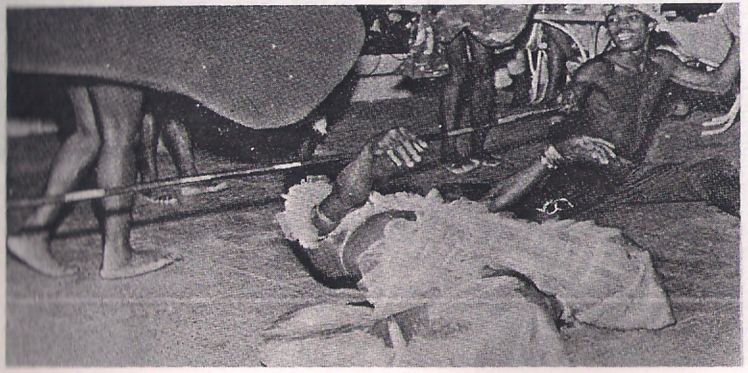
Among these areas are Puerto Rico with 2,667,000 people, Jamaica with 1,839,000, Trinidad-Tobago with 1 million, Barbados with 245,000, and the six new "U.K.-Associated States" with their 467,000 people.

In addition the Caribbean includes two important French-speaking colonies of France: Martinique (321,000), Guadeloupe (316,000), plus several smaller islands, and French Guiana.

The Netherlands Antilles (islands of Curacao, Aruba, Bonaire, etc.) adds a Dutch-speaking market of 210,000, and the Dutch-oriented South American coastal country of Surinam (324,000).

All this makes the Caribbean an important market for the recorded music of many major countries of the world. EMI, with record companies in English, French, Spanish and Dutch speaking countries, enjoys a particularly fine entrée here, as do its U.S., Mexican and South American companies.

Jamaican limbo dancers.



THE SEVEN INDEPENDENT COUNTRIES OF THE CARIBBEAN (in order of population)

(except Venezuela and Colombia—see South America)

	POPULATION	CAPITAL CITY	LANGUAGES SPOKEN
CUBA	7,833,000	Havana	Spanish
HAITI	4,660,000	Port-au-Prince	French and Creole
DOMINICAN REP.	3,750,000	Santo Domingo	Spanish
JAMAICA	1,839,000	Kingston	English (Brit. poss. 1655-1962)
TRINIDAD-TOBAGO	1,000,000	Port-of-Spain	English, Indian, Chinese dialects
GUYANA (So. Amer.)	662,000	Georgetown	Eng. & Hindu (former Br. Guiana)
BARBADOS	245,000	Bridgetown	English (Brit. poss. 1627-1966)
TOTAL	19,989,000		

THE SIX "ASSOCIATED STATES OF THE UNITED KINGDOM" (as of June 1967)

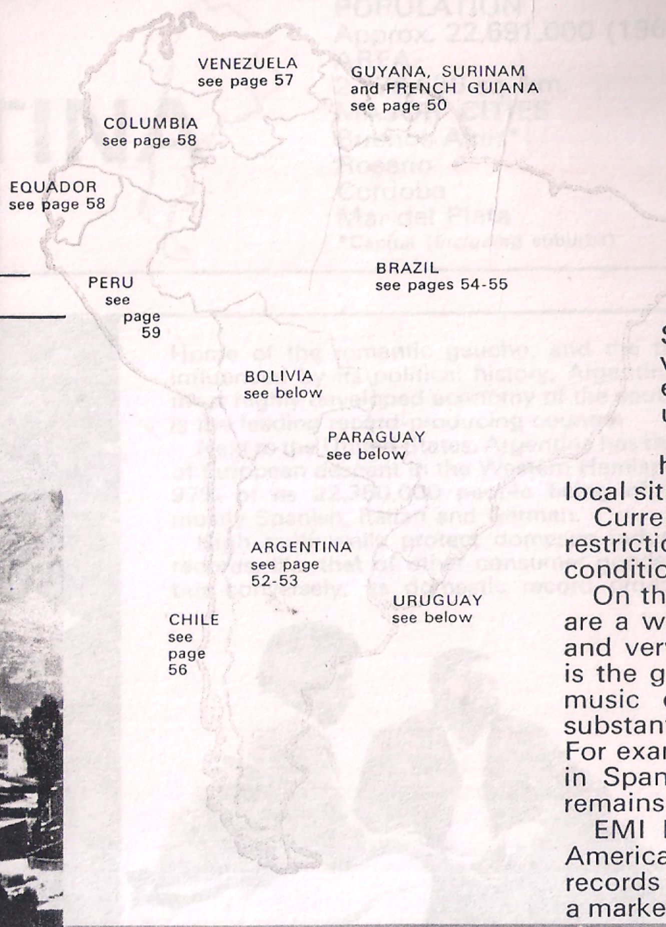
(incl. St. Vincent, expected to become an Associated State soon)

ST. LUCIA	99,000	St. George's	First four are former British colonies in the Windward Islands; the last two, in the Leeward Islands.
GRENADA	97,000	Castries	
ST. VINCENT	85,000	Kingstown	
DOMINICA	67,000	Roseau	
ANTIGUA	60,000	St. John's	
ST. KITTS*—NEVIS—ANGUILLA	59,000	Basseterre (on St. Kitts)	*St. Kitts also known as St. Christopher.*
TOTAL	467,000		

OTHER MARKET AREAS OF THE CARIBBEAN (in order of population)

PUERTO RICO (U.S.)	2,677,000	San Juan	English and Spanish lang.
SURINAM (Neth.)	324,000	Paramaribo	(for. Dutch Guiana) Dutch & Native dialects
MARTINIQUE (Fr.)	321,000	Fort-de-France	French poss. since 1635. Lang. Fr.
GUADELOUPE (Fr.)	316,000	Basse-Terre	Fr. since 1635; Lang. French
NETH. ANTILLES (Neth.) (Curacao, Aruba, Bonaire, etc.)	210,000	Willemstad (on Curacao)	Lang. Dutch, Eng. Span. and Papaimento dialects
BAHAMAS (Brit.)	138,000	Nassau	3,000 islands; 20 inhabited. (Eng.)
BERMUDA IS. (Brit.)	50,000	Hamilton	360 islands. 800 miles N. of Cuba
U.S. VIRGIN ISLANDS	50,000	Cayenne	Fr. poss. since 1626. N.E. coast of So. Am.
FRENCH GUIANA (Fr.) (St. Thomas, St. Croix, St. John, etc.)	36,000	Charlotte Amalie (on St. Thomas)	
MONTSERRAT (Brit.)	14,000	Plymouth	Brit. poss. in Leeward Is. since 1784
TURKS & CAICOS (Brit.)	6,000	Grand Turk	Brit. poss. just N. of Haiti
TOTAL	4,142,000		

1 One of the main shopping streets in Montevideo, capital of Uruguay.
2 General view of La Paz, capital of Bolivia, showing its location 12,000 ft. up in the Andes.
3 View of downtown La Paz.



SOUTH AMERICA

South America is a continent of contrasts. Countries are very large—and very small. Politics, both current and past, play a vital part in the economic health of each country, and mineral wealth, frequently unexploited, abounds.

It all adds up to a land of tremendous promise and potential. But here, as perhaps nowhere else in the world, an intimate knowledge of the local situation in each area is essential to maintain a business relationship.

Currency inflation is, of course, a major difficulty, which coupled with restrictions on the withdrawal of profits or capital, in some areas, makes conditions sometimes untenable.

On the plus side, South Americans, while varying in their race and heritage, are a warm, friendly, and music-loving people. Still an area of the very poor and very rich, a middle class is expanding rapidly, and here, as everywhere, is the great market for records and all products. While devoted to their own music colours and exciting rhythms, foreign artists frequently generate substantial sales, especially when they record in the idioms of the country. For example, Capitol's great artist, the late Nat Cole, recorded "Cole Espanol" in Spanish (which he did not speak) some years back, and to this day it remains probably the largest album in total sales.

EMI has always maintained major companies in the key areas of South America, such as Brazil, Chile and Argentina, where in addition to selling records from their foreign affiliates, they record local music, which also finds a market in world export.

URUGUAY

POPULATION 2,749,000 (1966)
AREA 186,924 sq. km.
CAPITAL Montevideo 1,202,890
EXCHANGE RATE £1=330 Uruguayan pesos
PER CAPITA INCOME PER ANNUM £172

Number of Record Manufacturers	9
Number of Indigenous Labels	6
Number of Pressing Plants	4
Number of Recording Studios	3
Number of homes with record players	90,000
Number of Radio Stations	21
Number of TV channels	4
Number of Music Publishers	4
Number of Music Licensing Organizations	A.G.A.D.U., Montevideo.

PARAGUAY

POPULATION 2,094,000 (1966) AREA 406,628 sq. km.
CAPITAL Asuncion 321,187
EXCHANGE RATE £1=346 guarani
PER CAPITA INCOME PER ANNUM £60

Number of Record Manufacturers	3
Number of Indigenous Labels	2
Number of Recording Studios	1
Number of homes with record players	15,000
Number of Radio Stations	7
Number of TV channels	1
Number of Music Publishers	1

BOLIVIA

POPULATION 3,748,000 (1966) AREA 1,098,575 sq. km.
CAPITAL La Paz 461,000
EXCHANGE RATE £1=33.8 Bolivian pesos
PER CAPITA INCOME PER ANNUM £46

Number of Record Manufacturers	3
Number of Radio Stations	1

ARGENTINA

POPULATION
Approx. 22,691,000 (1966)
AREA
2,776,656 sq. km.
MAJOR CITIES

Buenos Aires*	7,000,000
Rosario	800,000
Cordoba	700,000
Mar del Plata	400,000

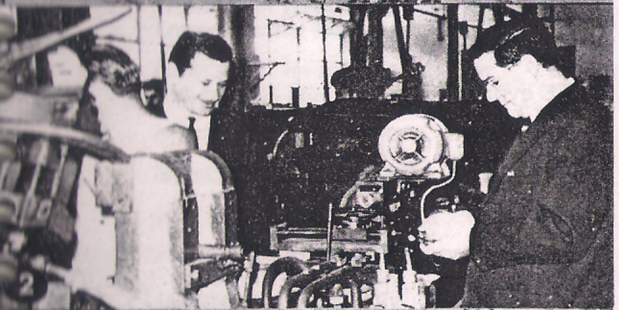
*Capital (*including* suburbs)

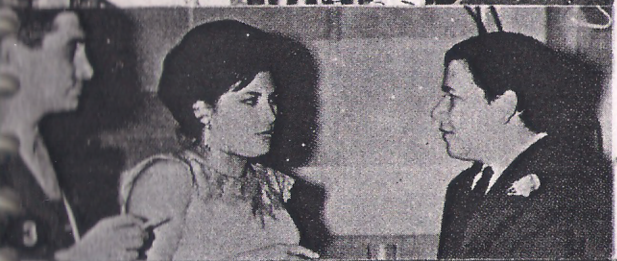
POPULATION BY AGE GROUPS (1965)

0—14	6.7 million
15—24	3.7 million
25—49	7.6 million
50+	4.4 million
TOTAL	22.4 million

NUMBER OF FAMILY UNITS 5 million

EXCHANGE RATE
£1=976 pesos (April 1967)
PER CAPITA INCOME PER ANNUM £185
BLOC MEMBERSHIP
Member of ALALC (Latin-American Free Trade Area)





Home of the romantic gaucho, and the tango, and strongly influenced by its political history, Argentina has probably the most highly developed economy of the southern continent, and is the leading record-producing country.

Next to the United States, Argentina has the largest population of European descent in the Western Hemisphere, approximately 97% of its 22,350,000 people being of European ancestry, mostly Spanish, Italian and German.

High tariff walls protect domestic industry. The import of records, like that of other consumer goods, is relatively small, but conversely, its domestic record production and record-player production is strong. EMI's associate company in this country estimates that 1,750,000 of its 5 million families have a record player. (Over 200,000 new players are sold annually.)

In 1966, domestic sales of records topped 10 million units, with almost 4 million being 12-inch LPs. Much of this is of Argentine origin and that of other Latin-American countries, but in addition many European recordings, particularly classics, are pressed under licence.

EMI has been producing records in Argentina since 1919, and in 1925 established its present company, Industrias Electricas y Musicales Odeon, with its main factory in the Buenos Aires suburb of Belgrano. In 1935 the company moved the studio and head office facilities into the centre of Buenos Aires.

The EMI Odeon recording studios are among the most modern and active in Argentina, and EMI has done much to bring Argentine artists to the attention of music lovers throughout the world. EMI accounts for approximately one in six of all records sold in the country.

Carlos Gardel, Francisco Canaro and Roberto Firpo, three of the first tango artists to be recorded by EMI, are still selling steadily today on the Odeon label, not only in Argentina, but all over the world. Gardel, killed in an air crash in 1935, has sold some 7 million records to date.

Odeon folklore stars Atahualpa Yupanqui and Atilio Marinelli resting between sessions at the Folklore Festival.

ARGENTINA

Number of Record Companies
Major 3 Others 19
Plus a number of smaller companies

Number of Pressing Plants 7

Number of Recording Studios of Major Record Manufacturers 3
Number of Recording Studios of Other Record Manufacturers 6

Number of Record Labels
Indigenous labels currently active 37

Number of Retail Record Outlets 450

Number of Record Clubs 3

Number of Rack Jobbers 14

Estimated number of Record Players
1,750,000
Number sold annually
200,000—240,000

Total number of Juke Boxes in operation less than 1,000

Number of Records Sold (1966)

7″ Singles	5,330,000
7″ EPs	1,680,000
LPs	3,930,000

Mix of Records Sold (1966)

Popular	Singles	5,330,000
	EPs	1,680,000
	LPs	3,060,000
Classical	LPs	870,000

Retail value of records sold (1965) (excluding boxes)

Normal channels	£5,000,000
Other	£1,000,000
Total	£6,000,000

Number of Radio Stations
94 Radio Stations
Record playing time nearly 50%

Radio Receiver Ownership
80% of families own radio receivers

Television broadcasting of records
30 TV stations—all UHF
1.5 million families own TV
200,000 sets sold annually

Pre-recorded tape
Sales began in 1967
(4 track stereo cartridges)

Miscellaneous Music Business
Motion Picture Theatres 2,012

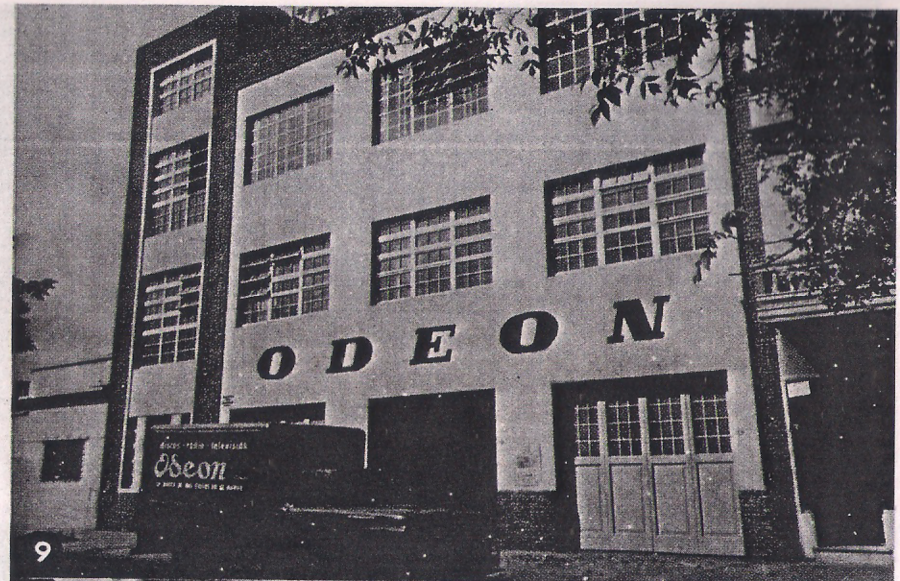
Music Publishers
6 Principal houses
About 60 smaller publishers

Music Trade Association
S.A.D.E.M. (Sociedad Argentina de Editores de Música)

Music Licensing Organizations
All publishers license their repertoires of international music
Sociedad Argentina de Autores y Compositores (S.A.D.A.I.C.) is the only organization comparable to B.I.E.M.

Copyrights established by
Depósito Nacional de Propriedad Intelectual

1 A lunch given for Altemar Dutra at the Claridge Hotel, Buenos Aires.
2 Mr Mauricio Brenner of Fermata and the Odeon Record Factory Manager Mr F. Lataste.
3 Altemar Dutra and folklore star Ramona Galarza.
4 The Odeon Record Factory in Buenos Aires.
5 Ramona Galarza receiving an award at the Mar del Plata Festival, March 1966.
6 Hugo del Carril, a noted tango artist, signing a contract with Odeon. On the left is Philip Brodie, formerly the Managing Director of I.E.M.O.
7 Mr Brenner of Fermata visiting the Odeon Record Factory, Buenos Aires.
8 Mr Philip Brodie with Los Wawanco.
9 A further view of the Odeon Record Factory, Buenos Aires.
10 The Gold Statue Award 1966—The Shakers—Rosario.
11 Florindo Sassone making a recording in Odeon's recording studios prior to his visit to Japan.



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10

11

BRAZIL

POPULATION
84,679,000 (1966)
AREA
8,511,965 sq. km.
MAJOR CITIES

Sao Paulo	3,825,351
Rio de Janeiro	3,307,163
Belo Horizonte	693,328
Brasilia (capital)	141,742

POPULATION BY AGE GROUPS (1960)

0—14	29.9 million
15—24	13.3 million
25—49	19.7 million
50+	7.2 million

NUMBER OF FAMILY UNITS 17 million

Number of Record Companies
Major 4 Minor 10

Number of Record Pressing Plants 8

Number of Recording Studios of Major Record Manufacturers 4
Number of Recording Studios of Other Record Manufacturers 15

Number of Record Labels
Indigenous labels currently active 21 Significant 40 Small
Additional foreign-owned labels pressed under licence 32

Estimated number of Record Players 430,000
Annual sale 70,000

Total number of Juke Boxes in Operation Approx. 100

Number of Records Manufactured 1966

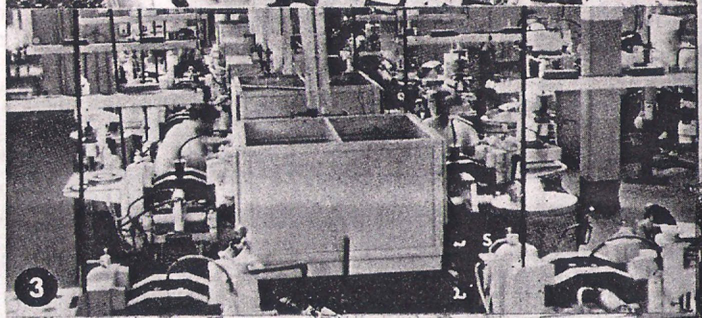
7" Singles	4,080,000
7" EPs	1,660,000
12" LPs	3,760,000

Mix of Records Manufactured
Popular 97%
Classical 3%

Number of records sold

1964	5,800,000
1965	7,400,000
1966	8,600,000

Number of Radio Stations
1,319 private stations
8 Government owned



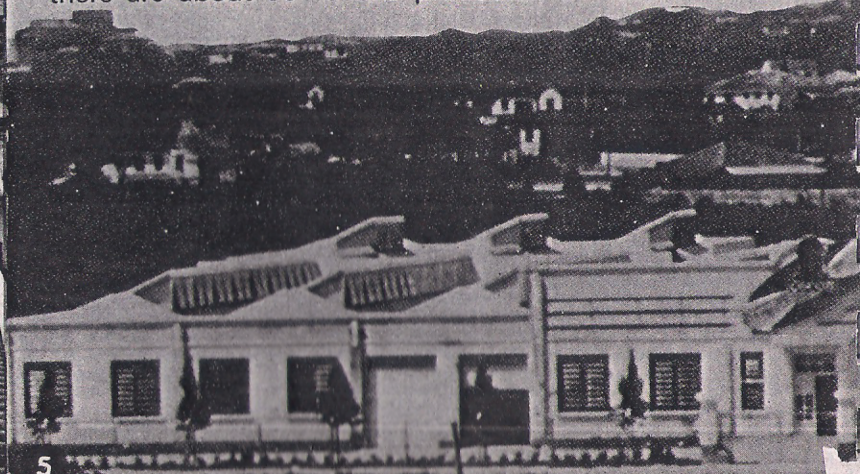
Brazil, the only Latin-American nation deriving its heritage and language from Portugal, is not only the largest in South America in area but potentially one of the richest in the world.

Covering nearly half of South America, supporting almost half of the continent's population, Brazil is rich enough in minerals, timber and water power to support a full-fledged industrialized nation.

Also, its vast area and variety of soils and climate lend themselves to almost any kind of agriculture. Only 2% of its land is now under cultivation, yet it already supplies nearly 40% of the world's coffee, over half of South America's bananas and huge crops of sugar, sugar cane, cotton, grains, rice, oranges, etc.

Unfortunately the country is still plagued with inflation and still lacks the economic stability to attract foreign investment capital. The Brazilian cruzeiro, which in eight years (1959-67) had decreased in value from 22 to the U.S. dollar to 2,700 to the $ in 1967, has recently been devalued and a new cruzeiro worth 1,000 old cruzeiros introduced.

In terms of the potential of its 80 million music-loving people, the 50-year-old record industry could be said to be still in its infancy. In 1966 sales were close to 9 million records, almost half of them LPs. A boom in the record industry some ten years ago attracted many newcomers but several had a very short life. In 1967 there are about 50 record producers of which 14 can



BRAZIL

EXCHANGE RATE
£1=7.53 new cruzeiros
PER CAPITA INCOME PER ANNUM
£80
BLOC MEMBERSHIP
Latin-American Common Market

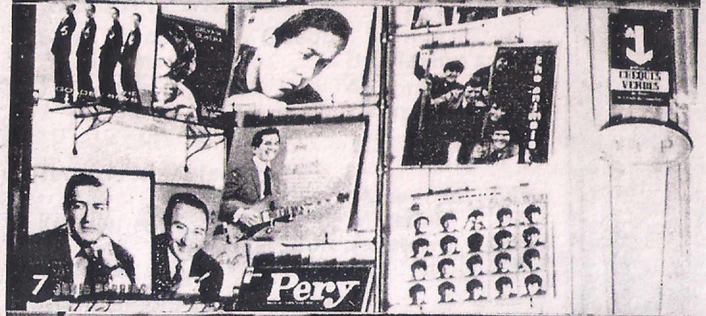
be considered significant, eight of them with their own manufacturing facilities.

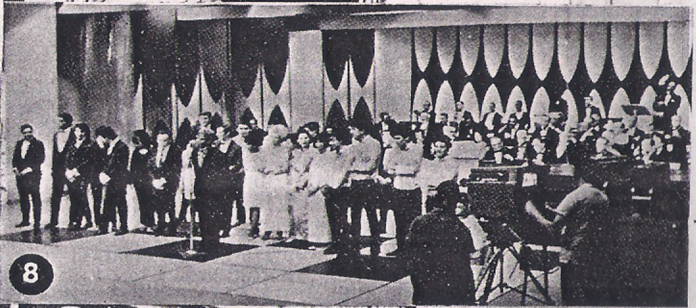
In 1958 the pressure of events, especially in the governmental area, forced the record producers to form their own organization "Associacao Brasileira dos Produtores de Discos" which has been of invaluable help in dealing with matters of common interest.

EMI's company in Brazil is I.E.M. Fabrica Odeon S.A., with its own offices, recording studios in Rio and its own pressing plant, and with distribution and promotion facilities in all major cities. The Odeon label is the oldest and best known in Brazil with a history going back to 1913.

Brazilian composers, recording artists and music have contributed exciting and unique rhythms to the worlds of pop and classical repertoire. Villa-Lobos is one of their best-known classical composers. The annual Rio festival has brought the excitement of Brazilian music to the attention of millions.

Dom Pedro II, Emperor of Brazil, whose abdication in 1889 resulted in the formation of the present Republic, was a personal friend of Thomas Edison, and his was one of the first voices to be recorded by Edison on the newly invented phonograph. In 1913 the first Odeon records in Brazil were pressed by a firm called "Casa Edison".





Radio Receiver Ownership
8,300,000

Television broadcasting of records
30 TV Stations, all UHF

Principal Stations
TV Globo, TV Rio, TV Record,
TV Nacional, TV Gaucho,
TV Jornal de Comercio,
TV Villa Rica, TV Anhanguera

Networks TV Excelsior
Emissoras Associadas

Number of families with TV
2,500,000
Annual sale of sets 100,000

Pre-recorded tape
Virtually unknown

Miscellaneous
Motion picture theatres
About 4,000 Others 100

Music Business:
Music Publishers 50
Music Licensing:
Public Performance S.B.A.C.E.M.,
U.B.C., S.I.C.A.M.,
S.A.D.E.M.B.R.A.
Musical Rights:
A.D.D.A.F., S.B.A.C.E.M.,
Sinfobrás

1 The Rio Sales Manager of I.E.M.O. being presented with a trophy for his departmental sales. On the right is Dr Henry Jessen, Managing Director of I.E.M.O.
2 In the Control Room of the Rio studios during a recording session.
3 Part of the Press Room of the São Bernardo factory.
4 The Packing Department of the São Bernardo factory.
5 General view of the factory at São Bernardo.
6 Altemar Dutra making a personal appearance at an important Brazilian record shop.
7 Window display of Odeon LP records.
8 Odeon artists during the Odeon-Kolynos TV show.
9 As a curiosity: football is extremely popular in Brazil, and Odeon has its own victorious team, which has won 132 successive games in its own particular league.

CHILE

POPULATION
8,900,000 (1965)
AREA
741,773 sq. km.
MAJOR CITIES

Santiago (capital)	2,260,000
Valparaiso	281,000
Concepcion	166,000
Viña del Mar	148,000
Talcahuano	117,000
Antofagasta	105,000

POPULATION BY AGE GROUPS (1960)

0—14	2.9 million
15—24	1.3 million
25—49	2.1 million
50+	1.0 million
TOTAL	7.3 million

FAMILY UNITS
1,780,000

EXCHANGE RATE
£1=15.5 escudos (June 1967)
PER CAPITA INCOME PER ANNUM
£220
BLOC MEMBERSHIP
Member of A.L.A.L.C.
(Latin-American Free Trade Area)

Chile is a unique market of 9 million people living in a long, narrow strip of land 2,650 miles from north to south with an average width of only 110 miles.

The people of Chile are noted throughout the continent for their sense of responsibility, enterprise and ready humour. The father of this racially mixed land was part-Spanish, part-Irish Bernardo O'Higgins who led them to independence from Spain in 1818. Chile has always been considered one of the most democratic of the South American republics.

Until 1927 all records sold in Chile were imported, as there were no local pressing facilities. In 1927 EMI and one other record company began manufacturing, and since that time the record business has grown steadily, as has the population. In 1927 there were 4 million people in Chile, by 1967 almost 9 million.

Chile was late developing a roster of local recording artists. From 1927 until 1951 most of its pressings were from foreign masters. However, during the past 15 years an extensive catalogue of Chilean folk music has been recorded featuring an impressive list of Chilean artists, many of whom have become popular throughout Latin America. Over 100 radio stations, 400 juke boxes, television and printed media have helped to build local hit artists and hit songs.

The EMI company in Chile, Industries Eléctricas y Musicales Odeon, S.A., is still the top record company in the country, with over 40% of the volume and a network of 300 distributors covering every town and village of any importance the length of the land. It maintains modern studios and pressing facilities in Santiago, the capital city and headquarters of the Chilean record industry.

No. of Record Companies
Major 3 Others 4

No. of Record Pressing Plants 3

No. of Recording Studios of Major Record Manufacturers 2 (Odeon, RCA)
No. of Recording Studios of Other Organizations 1

No. of Record Labels
Indigenous labels currently active 7
Indigenous labels of major manufacturers 5
Additional foreign-owned labels 58

No. of Retail Record Outlets approx. 300
Estimated No. of Record Players 150,000
No. sold annually 26,000

Total No. of Juke Boxes in operation 3,000

Value of Records Manufactured
(at mfg. value 1966/7) Chilean Escudos 16,000,000
Retail value of records sold (1966/7)
Chilean Escudos 23,000,000

Sales of records by Odeon

By diameter		By playing speed	
7" Singles	65.6%	45 rpm	68.7%
7" EP	3.1%	33 rpm	31.3%
10", 12" LP	31.3%		

Mix of Records Manufactured

Popular	Latin American	56%
	U.S. Material	6%
	Europe, etc.	25%
Classical	Classical	13%

No. of Radio Stations 160
(including five at State Universities)
Estimated playing time 70%

Radio Receiver Ownership
70% of homes have radio receivers

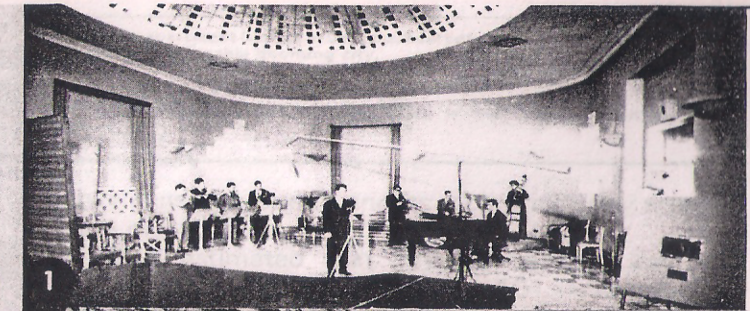
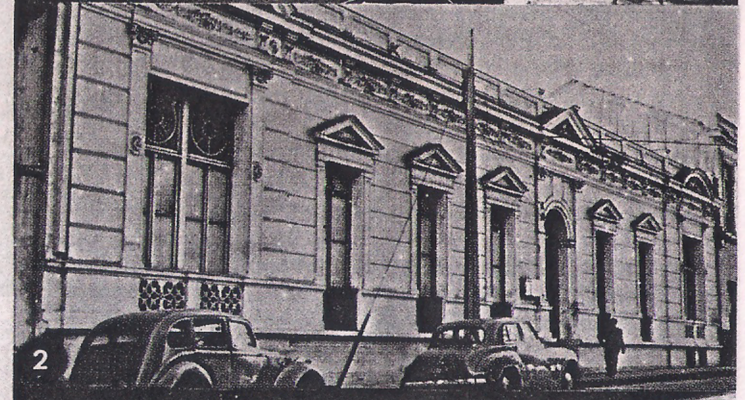
Television broadcasting of records
No. of Stations 4 VHF
(all belonging to State Universities)
No. of families with TV approx. 100,000
Sales of TV sets 25,000-30,000 per year
(No colour TV)

MISCELLANEOUS
No. of Motion Picture Theatres 260
No. of Other Theatres 100

Music Publishers 1

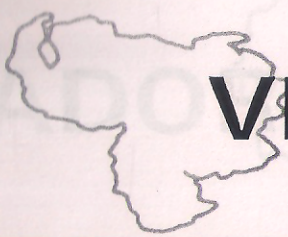
Music Trade Association
Cámara Chilena de Productores Fonográficos

Music Licensing Organizations
B.I.E.M., S.A.D.A.I.C.,
Southern Music International

1 I.E.M.O.'s recording studio auditorium, Santiago.
2 Front view of I.E.M.O.'s offices in Santiago.
3 Fernando Montes singing at the "Odeon" 1966 Festival.

VENEZUELA



POPULATION
9,189,000 (1966)
AREA
911,807 sq. km.
MAJOR CITIES

Caracas (Capital)	1,675,000
Maracaibo	530,000
Barquisimento	236,000
Valencia	204,273

POPULATION BY AGE GROUPS (1965)

0—14	4.0 million
15—24	1.5 million
25—49	2.3 million
50 +	0.9 million
Total	8.7 million

NUMBER OF FAMILY UNITS
$2\frac{1}{2}$ million
EXCHANGE RATE
£1 12.5 Bolivars
PER CAPITA INCOME PER ANNUM £268

1 New apartment houses in Caracas, heart of the vast new development programme for this booming city.

2 Further reconstruction taking place in the University City area of Caracas.

Number of Record Manufacturing Companies 14
Number of Pressing Plants 5
Number of Recording Studios of Record Manufacturers 9
Number of Record Labels
Indigenous labels currently active 12
Estimated number of homes with Record Players 370,000
Total number of Juke Boxes in Operation 18,000
Estimated Record Sales (at manufacturer's selling prices) £1,000,000 (1965)
Number of Radio Stations 101
Television broadcasting of records
Number of Television Stations 6
No. of Music Publishers 4

Venezuela is unique among South American countries in several important respects.

Its Lake Maracaibo oil-field has, since 1917, made Venezuela one of the largest producers of oil in the world, brought in tremendous foreign capital and financed extensive economic development.

With its entire 1,750 miles of coastline on the southern boundary of the Caribbean Sea, Venezuela is an important factor in both the South American and the Caribbean economies, and of all South American countries it is, both geographically and economically, closely related to its North American neighbours.

Although still a rich man's country, with a relatively small middle class and a large population of native poor, its per capita income is the highest in all Latin America, its capital city, Caracas, one of the most modern, and its record industry one of the most active.

It is estimated that 370,000 families own a record player. 18,000 juke boxes, 101 radio stations and six television channels provide continuous exposure for its popular music. Clubs and night life in the coastal metropolitan areas add cosmopolitan flavour to the musical life of the country.

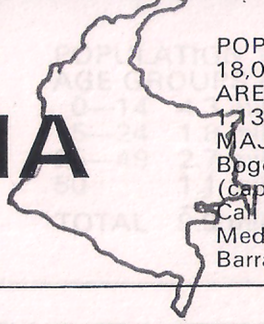
Importation of pop records is prohibited to protect its domestic record industry, which consists of 14 record companies, five pressing plants, nine recording studios and a number of music-publishing houses.

Classical records, and pre-recorded tapes, are imported from the United States and Europe. In addition to its own domestic pop recording, many pressings are made under licence from foreign masters, including music of other Latin-American countries.

EMI product is very strong among the classical imports, and many of the EMI companies, including its European and American subsidiaries, enjoy representation in the popular music field through licensed pressings.

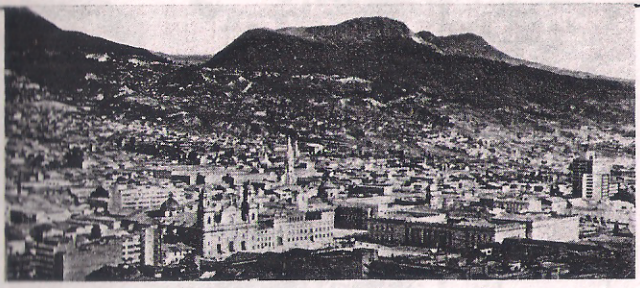
Venezuela is rich in natural resources. A third larger than Texas and half again as large as France, its Orinoco wilderness may someday provide wealth to rival in value its coastal oil-fields. Bethlehem and U.S. Steel are both beginning to develop huge deposits of iron ore. Its 60,000 coffee plantations yield the principal agricultural crop but both the government and private industry are working towards broadening the economic base.

COLOMBIA



POPULATION
18,000,000 (1966)
AREA
1,139,596 sq. km.
MAJOR CITIES

Bogota (capital)	1,681,000
Cali	813,000
Medellin	777,000
Barranquilla	521,000



NUMBER OF FAMILY UNITS
Est. 3·1 million
EXCHANGE RATE
£1=28 pesos (Free rate 45=£1 Aug. 66)
PER CAPITA INCOME PER ANNUM £98

Bogota, the capital of Colombia, a city standing at an altitude of 8,570 ft. and with a population of 1½ million.

Known as New Granada until 1861, Colombia originally included all of what is now the Republics of Panama, Venezuela and Ecuador. Today it is still the third largest country in area in South America, with 900 miles of coast on the Pacific and almost 1,100 on the Caribbean with five neighbours: Panama, Venezuela, Brazil, Peru and Ecuador.

Colombia's 18 million population supports a very active record industry rivalling that of its much larger neighbour Brazil, with an estimated production of over 8 million LPs. There are 11 record companies including EMI's licensee Compania Colombiana de Discos S.A. at Medellin.

Unlike many other countries, Colombia's three largest cities are inland: Bogota, the capital; Cali, the coffee and mining centre; and Medellin, the industrial centre. Barranquilla, the major seaport, is on the Caribbean. The record industry headquarters are in both Bogota and Medellin.

Colombia has 13 pressing plants, 185 radio stations and two TV channels. EMI's company also represents Capitol (U.S.) and Capitol de Discos (Mexico) and maintains modern studios and pressing facilities.

Number of Record Companies 11

Number of Record Pressing Plants 13

Number of Recording Studios of Record Manufacturers 5

Estimated number of Record Players 250,000

Number of Records Sold
Estimated total sales 1965
£1,300,000

Number of Radio Stations 185

Television
1 govt. station with 2 channels

Music Publishers 3

ECUADOR

POPULATION
5,386,000 (1966)
AREA
283,561 sq. km.
MAJOR CITIES

Guayaquil	652,000
Quito (capital)	402,000

POPULATION BY AGE GROUPS (1962)

0—14	2.0 million
15—24	0.8 million
25—49	1.2 million
50+	0.5 million

NUMBER OF FAMILY UNITS (1962) 0.9 million
EXCHANGE RATE £1=52 sucres
PER CAPITA INCOME PER ANNUM £62

The Plaza of San Francisco, birthplace of the city of Quito.

Ecuador is a small and mountainous country lying on the Equator between Colombia and Peru. Its 5 million people are largely native Indian and Mestizo, most of them engaged in agriculture.

Textiles and the manufacture of Panama hats are two of the main industries. Five record companies, two record-pressing plants, produce most of the records sold, although some are imported from the U.S. and other Latin-American and European countries.

EMI is represented in Ecuador by Industria Fonografica Ecuatoriana S.A., which operates the largest pressing plant in Guayaquil, largest city and chief seaport.

Number of Record Companies 5

Number of Record Pressing Plants 2

Number of Records Sold
Estimated total sales 1965
£100,000

Music Publisher 1

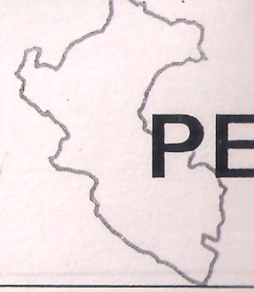
POPULATION
12,000,000 (1966)
AREA
1,285,215 sq. km.
MAJOR CITIES

Lima (capital)	1,715,971
Callao	161,286
Arequipa	156,657

POPULATION BY AGE GROUPS (1961)

0—14	4.3 million
15—24	1.8 million
25—49	2.7 million
50	1.1 million
TOTAL	9.9 million

NUMBER OF FAMILY UNITS
3,000,000
EXCHANGE RATE
£1 = 75 soles
PER CAPITA INCOME PER ANNUM
£90



PERU

Peru, once capital of the powerful Inca empire and later of the Spanish viceroys who ruled most of Latin America for 300 years, is a country rich in history and mineral resources. About 50% of the population are dependent on agriculture, its leading industry. Peru was founded by the Spanish conquistador Pizarro, who established both Lima, the present capital, and Callao, the principal seaport.

The country has a high degree of culture. The University of San Marcos was the first university to be established in the Western Hemisphere, in 1551, and education is both free and compulsory from the ages of 7 to 14. Peru's culture and art ranks high internationally.

Fifteen record companies are active, as well as five record-pressing plants. It is estimated that approximately a quarter million record players are in use. The country supports 10,000 juke boxes and its records are played over 100 radio stations as well as five TV channels. Imports of foreign records are considerable, imports from the U.S. alone ran over $200,000 (at factory value) in 1966.

EMI's affiliate company in Peru is Industrias Electricas y Musicales Peruanas, S.A. and its Odeon label records include both Peruvian repertoire and material from all of the EMI labels throughout the world, as well as licensed material from other Latin-American and North American labels.

Number of Record Manufacturing Companies 15

Number of Record Pressing Plants 5

Number of Recording Studios of Record Manufacturers 4

Number of Record Labels
Indigenous labels currently active 16

Estimated number of homes with Record Players 250,000

Total number of Juke Boxes in operation 10,000

Estimated Total Record Sales 1965
£800,000 (Retail value)

Mix of Records Sold:

Peruvian	55%
Other Latin	30%
European	15%

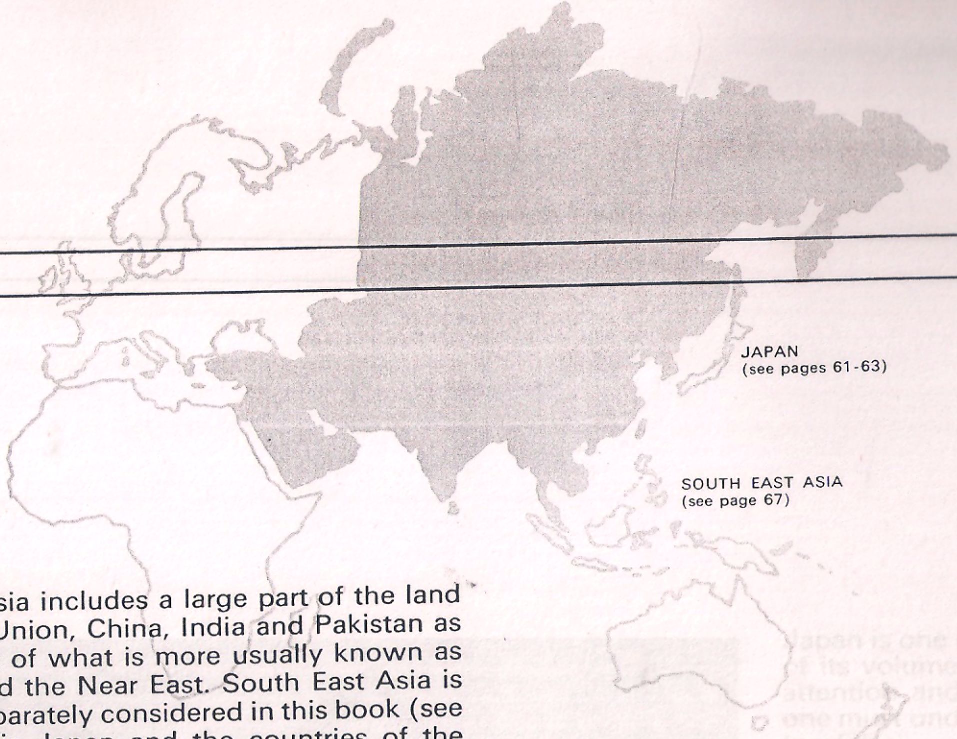
Number of Radio Stations
AM 100
FM 3

Television broadcasting of records
TV stations 12

MISCELLANEOUS MUSIC BUSINESS
Music Publishers 8
Music Licensing Organization APDAYC, Lima

1 The fine modern buildings and wide streets of Lima, the capital of Peru.
2 University of Cuzco students dressed in authentic Inca costumes performing Inca dances.
3 Fiesta on 6th January, the Day of Kings. On the right is a typical Peruvian musical instrument.

ASIA



The continent of Asia includes a large part of the land area of the Soviet Union, China, India and Pakistan as well as a large part of what is more usually known as the Middle East and the Near East. South East Asia is also a part but is separately considered in this book (see page 67) as, too, is Japan and the countries of the Near East, actually part of Asia.

This is the area of the world with about fifty per cent of the world's population which is increasing at a staggering rate. Much of this huge potential market is unavailable to international record companies both for economic and for political reasons. EMI once had a factory in China but this has long been inactive since that country became closed to the West. EMI's companies in India and Pakistan are described on the following pages and, of course, are extremely active in supplying not only their own markets but also many of the countries listed on this page. The companies in Hong Kong and Singapore are very active also in producing a great deal of Chinese repertoire in very many different dialects. EMI's links with Russia in the form of the agreement between Capitol and Melodiya are referred to elsewhere in this book.

It is to be hoped that, one day, the situation in relation to China may be changed and that this vast market of over six hundred million people will again be open to the trading countries of the West as it once was.

An old horn-type HMV gramophone still giving good service in the East.

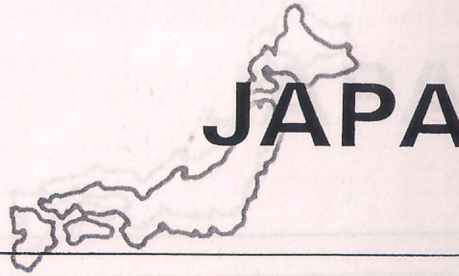
Herman's Hermits on an Eastern tour.

COUNTRIES OF ASIA (excluding S.E. Asia and Japan)

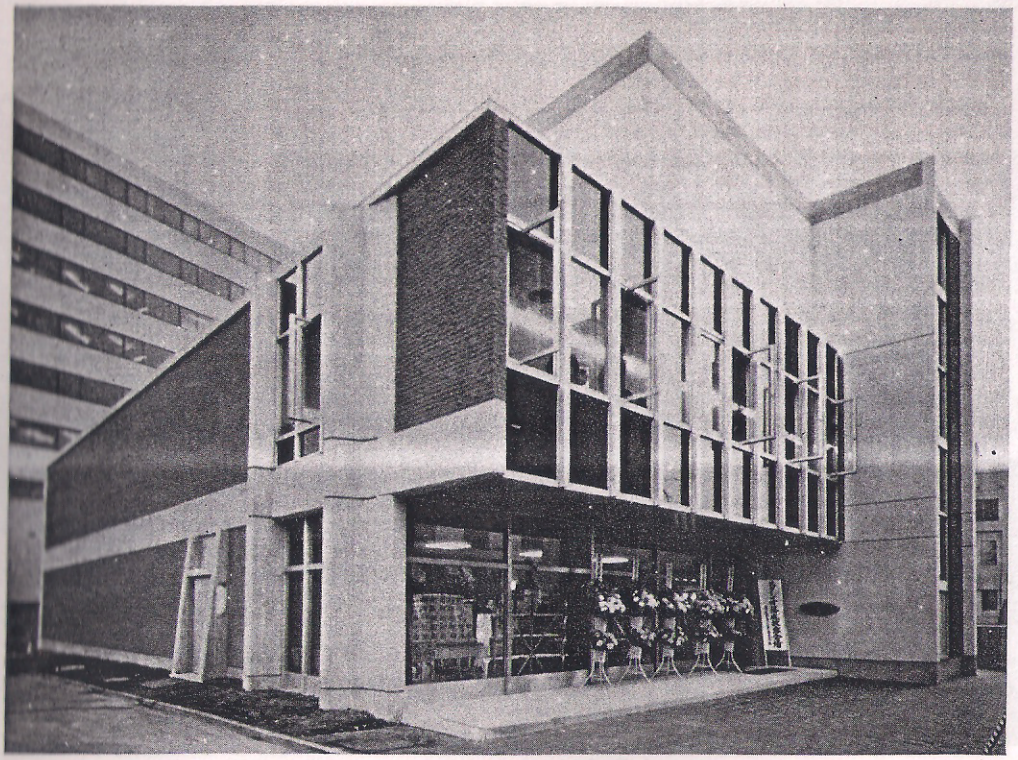
	Population		Population		Population
Afghanistan	13,000,000	Iran	24,000,000	Quatar	70,000
Bahrein	182,000	Maldive Islands	90,000	Saudi Arabia	6,000,000
Bhutan	700,000	Mongolia	1,050,000	South Arabia	900,000
Ceylon	10,625,000	Muscat and Oman	750,000	Trucial States	111,000
China	656,000,000	Nepal	9,388,000	U.S.S.R.(Asiatic)	106,433,000
India	492,000,000	Pakistan	93,721,000	Yemen	4,500,000

Total population 1,420,150,000

Press conference—Peter and Gordon meet the press and radio on a tour of the East.



JAPAN



Recording studio of Toshiba Musical Industries Ltd., Tokyo.

Japan is one of the largest record markets in the world, with more than half of its volume represented by foreign records. As such, it demands close attention and study. For to understand how to sell records in the Orient, one must understand the people, the customs, the traditions, the changing legalities . . . more so than anywhere in the world.

Japan is a land of paradox for the foreign businessman. The people bustle with energy and drive. New, ingenious, attractive products are being designed and produced in factories throughout the land. Visitors, especially from America and Europe, see great marketing opportunities on their first visit.

But Japanese business operates in a rigid pattern quite different from elsewhere in the world. Only in rare cases is foreign capital permitted to have a majority holding, and even then the language and customs seem to preclude any foreigner assuming a major management role.

Yet the Japanese learn rapidly and are quick to pick up foreign methods and ideas, adapting them to their special needs. For this reason, one finds Japanese executives travelling in all parts of the world, inquiring, photographing and gathering priceless "know how".

It is rare for a foreigner to have an investment in a Japanese record company. Perhaps Capitol-EMI is the only example, with its holding in Toshiba Music Inc., a subsidiary of the great Tokyo Shibaura Electric Co., Ltd.

The Japanese record market has expanded rapidly, in five years (1960/65) it more than tripled, slowing down only in 1966, when it registered a gain of less than 10%. Toshiba accounts for about 18% of the total Japanese record business, approximately 60% of which represents foreign records.

There are 20 million teenagers in Japan . . . a total concentrated population of close to 100 million, with Tokyo, the world's largest city. Seven major record companies serve this vast market together with a number of smaller companies.

JAPAN

POPULATION
99,180,000 (1966)
AREA:
369,777 sq. km.
MAJOR CITIES

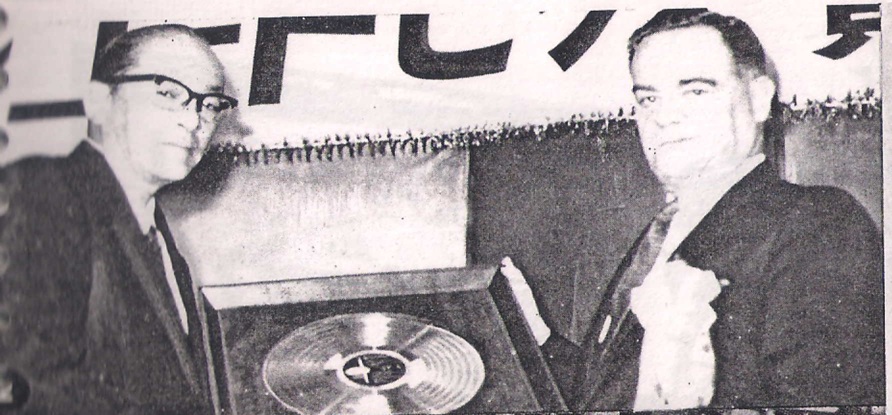
Tokyo (Capital)	10,869,244
Osaka	3,156,222
Nagoya	1,935,430
Yokohama	1,788,915
Kyoto	1,365,007
Kobe	1,201,000

POPULATION BY AGE GROUPS

0—14	25.6 million
15—24	19.8 million
25—49	34.0 million
50+	17.8 million
Total	97.2 million

NUMBER OF FAMILY UNITS: 24 million

EXCHANGE RATE
£1=1,010 yen
PER CAPITA INCOME PER ANNUM
£248
BLOC MEMBERSHIP
None



Number of Record Companies 12
Major 6
Others 6

Number of Pressing Plants of Major Record Companies 6
Number of Pressing Plants of Other Record Companies 3

Number of Recording Studios of Major Record Manufacturers 10
Number of Recording Studios of Other Record Manufacturers 15

Number of Record Labels
Indigenous labels currently active 9
Additional foreign-owned labels pressed under licence 51

Number of Wholesale Record Distributors 10

Number of Retail Record outlets 5033

Number of Record Clubs 5

Estimated number of homes with Record Players 4,600,000
Total estimated Number of Record Players 5,000,000

2 Mr. Motoji Kuno of Toshiba Musical Industries Ltd. presenting to Mr. Warren Birkenhead, resident representative of Capitol Records Inc., a tribute to Nat King Cole of a gold record for his outstanding success.
3 and 4 Photos of a typical Japanese record store with browser boxes.

Total number of Juke Boxes in Operation
Approx. 8,000

Number of Records Manufactured
94,489,791 (1966)
Value of record sales 1966
£41 million (at retail sales values)

Mix of Records Manufactured
By diameter

7″	82.9%
10″	.8%
12″	16.3%

By playing speed

45 rpm	63%
33 rpm	37%

Mix of Record Sales

Retail	88%
Wholesale	10%
Clubs	2%

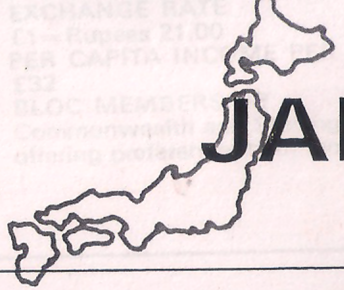
Mix of Records Manufactured

Popular	90%
Classical	10%

Domestic and export

Exports	1%
Domestic	90%

Number of Radio Stations
2 Semi-Govt. A.M. Networks
170 Stations
46 Commercial A.M. Stations
1 Semi-Govt. F.M. Network
80 Stations
1 Commercial F.M. Station
Principal Stations: NHK
Nippon HOSO
Bunka
TBS



JAPAN

Radio Receiver Ownership
90% of homes

Television
2 Semi-Govt. T.V. Channels
with 406 Stations
46 Commercial Stations
Principal Stations
- NHK
- NTV
- NET
- FUJI
- CH

1% of families have Colour T.V.
Approx. 6 hours colour per day

Tape
Types available
Reel-to-reel
8 Track cartridge
Cassette
Sales recent year £3,571,428

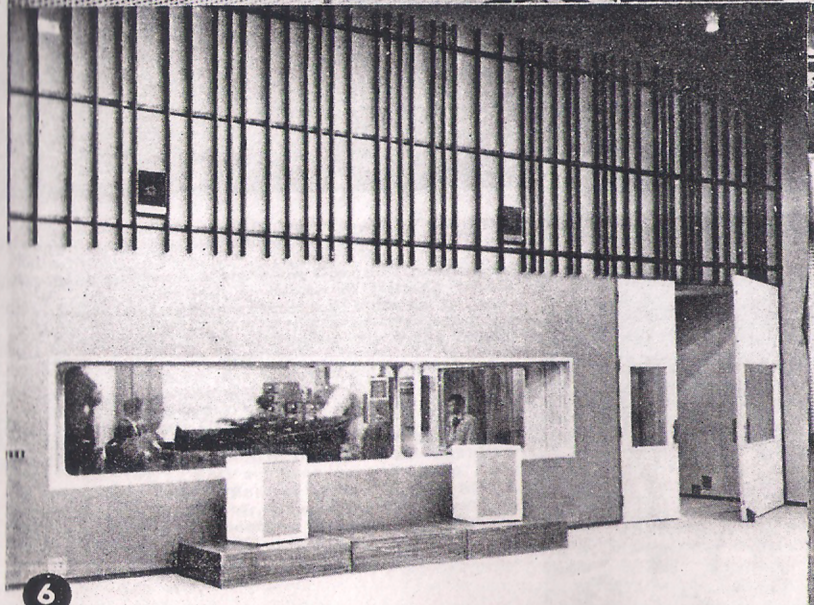
Miscellaneous
Motion picture theatres 30,000
Other theatres 300

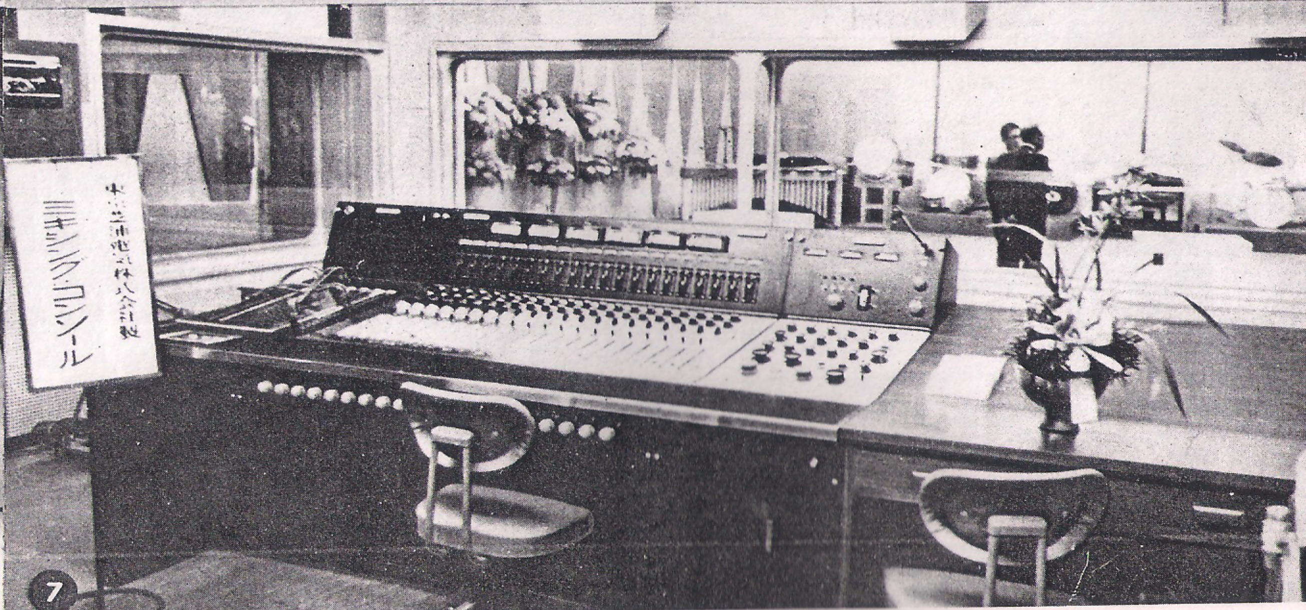
Number of Music Publishers 55

Music Trade Associations
Japan Phonograph and Record Association, Tokyo
National Record Dealers Union, Tokyo.

Music Licensing Organisations
Japanese Society of Rights of Authors and Composers (JASRAC)
agents for
ASCAP, BMI, BIEM, Fox, GEMA etc.
Suisei-Sha (BIEM sub-agents)
Mrs Folster & Associates

5 Recording session in Toshiba's Tokyo studios.
6 View of the control room from the large recording studio.
7 View of the recording console in the large Toshiba recording studio.





INDIA

POPULATION
492,000,000 (est. 1965/66)
AREA 3,268,081 sq. km.

MAJOR CITIES

Bombay	4,654,000
Calcutta	3,026,000
Delhi (incl. New Delhi) (capital)	2,369,000
Madras	1,865,000
Hyderabad	1,251,000

POPULATION BY AGE GROUPS (1961)

0—14	180,000,000
15—24	73,000,000
25—49	134,000,000
50+	52,000,000

NUMBER OF FAMILY UNITS 98.4 million (1961)

EXCHANGE RATE
£1=Rupees 21.00

PER CAPITA INCOME PER ANNUM
£32

BLOC MEMBERSHIP
Commonwealth and Sterling Area, offering preferential tariff facilities to members

Number of Record Companies
Major 1 (EMI) Others 7

Number of Record Pressing Plants 1 (EMI)

Number of Recording Studios of Major Record Manufacturers 4 (EMI)
Number of Recording Studios of Other Record Manufacturers 4

Number of Record Labels
Indigenous labels currently active 15
Indigenous labels of major manufacturers 3
Additional foreign-owned labels 18

Number of Wholesale Record Distributors 4

Number of Retail Record Outlets 1,000

Estimated number of Record Players & Radiograms 175,000
Estimated number sold annually 45,000

Total number of Juke Boxes in operation Approx. 300

Number of Records Manufactured (1966)
By playing speed

78 rpm	50%
45 rpm	37.5%
33 rpm	12.5%

Size of Domestic Record Market 1965/66

78 rpm	41%
45 rpm S	6%
45 rpm EP	19%
33 LP	34%
	100%

Mix of Records Manufactured
Popular 95% Classical 5%

Domestic and export sales

1965/66		1966/67	
Domestic	75%	Domestic	76%
Export	25%	Export	24%

Number of Radio Stations
42 Govt.-owned stations

Radio Receiver Ownership About 1.1% of families

Television broadcasting of records
Only one experimental station in Delhi—mainly educational programmes.
Number of families with TV 3,000

Pre-recorded tape
Estimated number of playback units 75,000
Pre-recorded tapes not produced or sold

Miscellaneous
Motion Picture Theatres: 3,566 Permanent 1,440 Touring

Films are a most important promotional medium for records in India, as records featuring film music outnumber other records in the proportion of 5 : 2 of issues. Attendances at cinemas are about 60% of capacity and the cinema is the most universally popular mass medium.

Record Magazines: Trade Publicatons 1
Consumer Periodicals: Record Sangeet (EMI)

1 Dr. Zakir Hussain, President of India, with Mr. Bhaskar Menon, Managing Director of the Gramophone Co. of India Ltd.
2 Mr. J. G. Stanford, Managing Director (Overseas) of EMI Ltd., presenting an album of Nehru's speech records to the late Prime Minister of India, Lal Bahadur Shastri.
3 HMV artists with Prime Minister Mrs. Indira Ghandi (in black sari) at New Delhi.
4 Tie-up display for the Cliff Richard film "Summer Holiday" in a Delhi cinema foyer.
5 HMV artists performing at the mammoth gathering for Republic Day in Calcutta.
6 The late Prime Minister Jawaharlal Nehru at the HMV stall at the British Pavilion at the India Exhibition, New Delhi, admiring an HMV super-de-luxe radiogram.
7 A window display in Bombay for The Sound of Music.
8 Managing Director Mr. Bhaskar Menon presenting an LP recording of speeches to Mrs. Indira Gandhi, Prime Minister of India.

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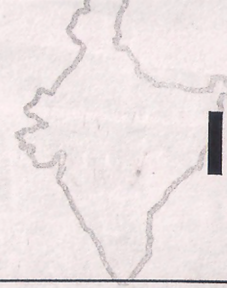

INDIA

In terms of population, India is the second largest country in the world with a rapidly increasing population expected to be at least 530 million by 1970/71. This vast population is, however, beset with colossal economic and human problems as the world knows, and will not rank as one of the major record markets of the world until the fundamental problems of famine and unemployment are successfully conquered.

However, the country is rich in culture and musical tradition, and in India EMI *is* the gramophone record industry with the only manufacturing plant in the country. Its roots go deep—back to 1907 when the Gramophone Company of Hayes established its first foreign factory, and even before that date when the company's recording engineers made vernacular recordings on trips from Europe. The company's present factory at Dum-Dum, Calcutta, is up to date in all manufacturing techniques and is wholly air-conditioned. The Gramophone Company of India (Private) Ltd. maintains recording studios plus distribution depots in Calcutta, Bombay, Delhi and Madras and, despite the size of this huge country, maintains direct distribution arrangements with over 1,000 record dealers. The "family relationship" between the dealers and the company built up by their joint associations over many years is something quite unique in the record business. There is a fierce pride in the HMV trade mark throughout the retail trade.

The record market in India is complex and demands a profound knowledge of the country for successful marketing of records. First, there is the problem of language, for there are several hundred languages and dialects in the country, each with its own musical culture and repertoire. The Indian company markets records in nearly 40 different languages—folk songs and music as well as the great classical music of India, now gaining increasing acceptance in the West, as performed by such eminent artists as Ravi Shankar, Ali Akbar, Vilayat Khan, Bismallah Khan and many others. It also records the soundtracks and hit records from the vast Indian film industry, so vitally important in the record market in India. As to Western music, India represents a market that is surprisingly big, in view of the strength and multiplicity of its own repertoires; U.S. and European repertoires represent 20% of the total domestic market. Secondly, successful marketing demands a highly developed distribution system and the Indian company is proud that HMV records can be found even in remote villages with no electricity, played upon one of the justly famous HMV Horn Gramophones, still giving good service in so many places. But, of course, the major markets are in the large cities. Thirdly, survival in conditions of severe government import restrictions and foreign exchange difficulties demands the ability to export successfully, and the Indian company, in the face of competition from Europe, the United States and Japan, manages to export substantial quantities of European and American records, pressed in India under licence from all the leading labels of the world. It also exports a very large number of records of Indian, Chinese, Malay, Thai, Burmese and Sinhalese repertoires. Latterly, the Indian company has entered, with high impact, an entirely new and potentially large export market in the countries of Eastern Europe where trade with India is greatly facilitated by the existence of bilateral trade agreements permitting payment in Indian rupees.

The Gramophone Company of India is solidly established and well placed to take advantage of the expected steady growth of the economy and development of the market. And its many famous recordings of the great poets, musicians and statesmen of India—Tagore, Gandhi, Nehru—serve to illustrate how the company is intimately a part of the Indian cultural scene.

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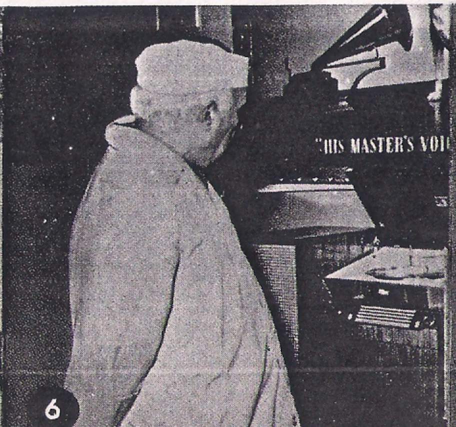

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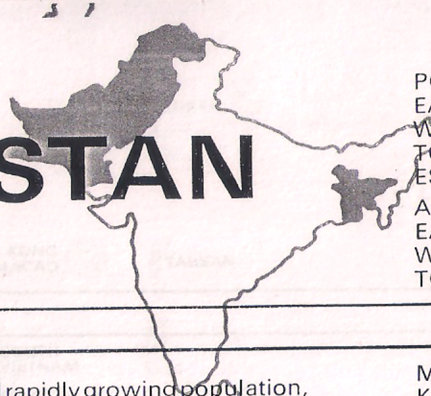
PAKISTAN



POPULATION:

EAST PAKISTAN	50,840,235	(1961 census)
WEST PAKISTAN	42,880,378	(1961 census)
TOTAL	93,720,613	(1961 census)

EST. POPULATION (1964) 112,410,000

AREA

EAST PAKISTAN	142,774 sq. km.
WEST PAKISTAN	803,940 sq. km.
TOTAL	946,714 sq. km.

Pakistan has a large and rapidly growing population, but the per capita income is low and records are still much of a luxury purchase. As a record market it faces formidable problems of distribution with the country being divided into two halves—East and West and with India between.

EMI's Associate company—The Gramophone Co. of Pakistan Ltd.—was formed in 1954, 60% of the capital being held by EMI and the balance by Pakistani interests. A factory was established in Karachi, local manufacture consisting of 78 rpm, 45 rpm standard and EP records. The company has developed a considerable Pakistani repertoire accounting for about 70% of sales and closely related to locally produced films, which are the most impotant promotional medium in the country. Recordings are carried out in Karachi, Dacca and Lahore in Urdu, Bengali and other dialects.

As elsewhere, EMI in Pakistan *is* the gramophone record industry and is well placed to take advantage of future possibilities and developments.

MAJOR CITIES

Karachi	1,912,598 (West)	Hyderabad	434,537 (West)
Lahore	1,296,477 (West)	Chittagong	364,205 (East)
Dacca	556,712 (East)	Rawalpindi*	340,175 (West)

*Capital

POPULATION BY AGE GROUPS (1961)

0-14	40.2 million
15-24	14.3 million
25-49	25.3 million
50	10.5 million
Total	90.3 million

NUMBER OF FAMILY UNITS
19 million

EXCHANGE RATE
£1 = 13.33 rupees

PER CAPITA INCOME PER ANNUM £31

BLOC MEMBERSHIP Member (with Iran and Turkey) Regional Community Development Scheme

Number of Record Manufacturing Companies 1 (EMI)

Number of Record Pressing Plants 1 (EMI)

Number of Recording Studios of Major Record Manufacturers 3. Others 9 (for film sound tracks)

Number of Record Labels
Indigenous labels currently active 1
Additional foreign-owned labels pressed under licence 10

Number of Wholesale Record Distributors 1

Number of Retail Record outlets
West Pakistan 116. East Pakistan 73

Number of Records Manufactured (1965)

7″ Singles	27.7%
7″ E.P.s	18.6%
10″ 78 rpm	53.7%

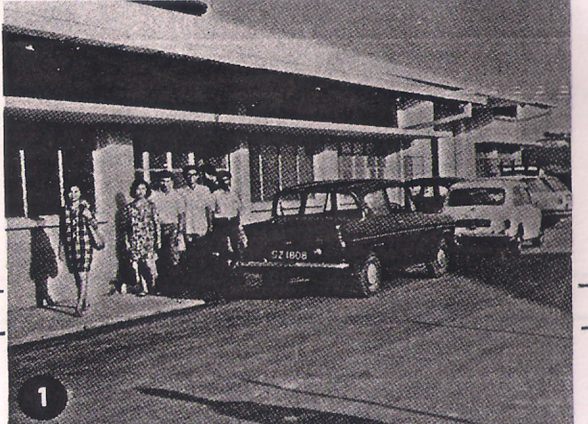
Mix of Records Manufactured
Domestic and Export, Domestic 70%, Export 30%

Number of Radio Stations
6 West Pakistan, 3 East Pakistan, all govt. owned
2 hours record playing per day

Television broadcasting of records
Two Govt. stations, 23,000 sets in use

Miscellaneous: Motion Picture Theatres
127 East Pakistan, 337 West Pakistan, plus 33 mobile units
Almost all 'pop' repertoire consists of film sound tracks, hits etc. and the motion picture theatres are a most important means of promotion.

1 Glenn Wallichs, Chairman of Capitol Records Inc., visiting the recording studio to see a typical Pakistani recording session. With him are Mr. W. J. Richmond of EMI and Mr. Rashid Latif, Director and Factory Manager of the Gramophone Co. of Pakistan Ltd.
2 A folk song being recorded in our Pakistani studios. Four Sarangis (an ancient Indo-Pakistani instrument) accompany the singer.



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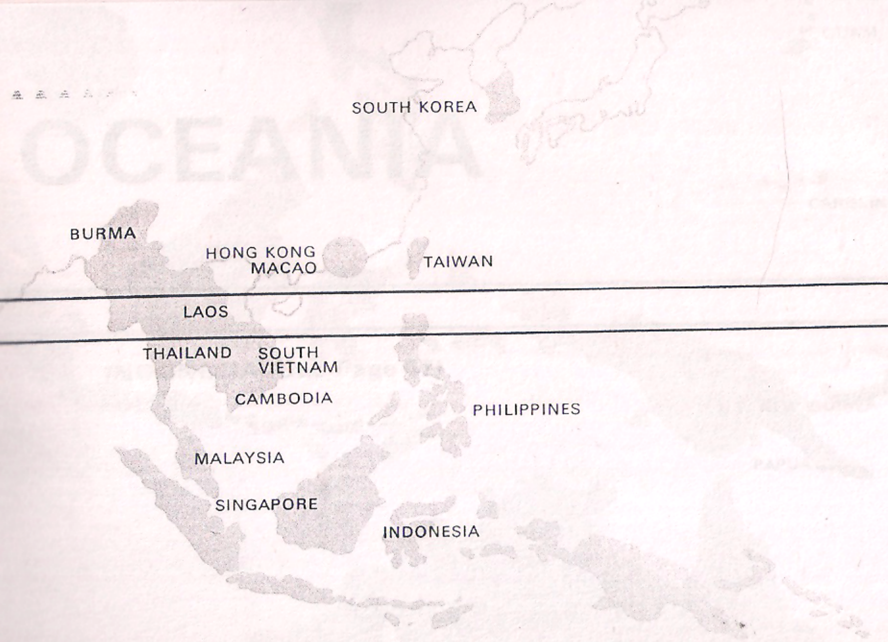
1 Workers leaving the new Singapore factory of EMI Records (South East Asia) Ltd.
2 The press room in operation at the Singapore factory.
3 A Chinese artist signing a contract in EMI's Hong Kong office. On the right is Miss Miriam Wang of EMI Hong Kong.

SOUTH EAST ASIA
(EXCLUDING JAPAN)



THE COUNTRIES OF SOUTH-EAST ASIA (EXCLUDING JAPAN)

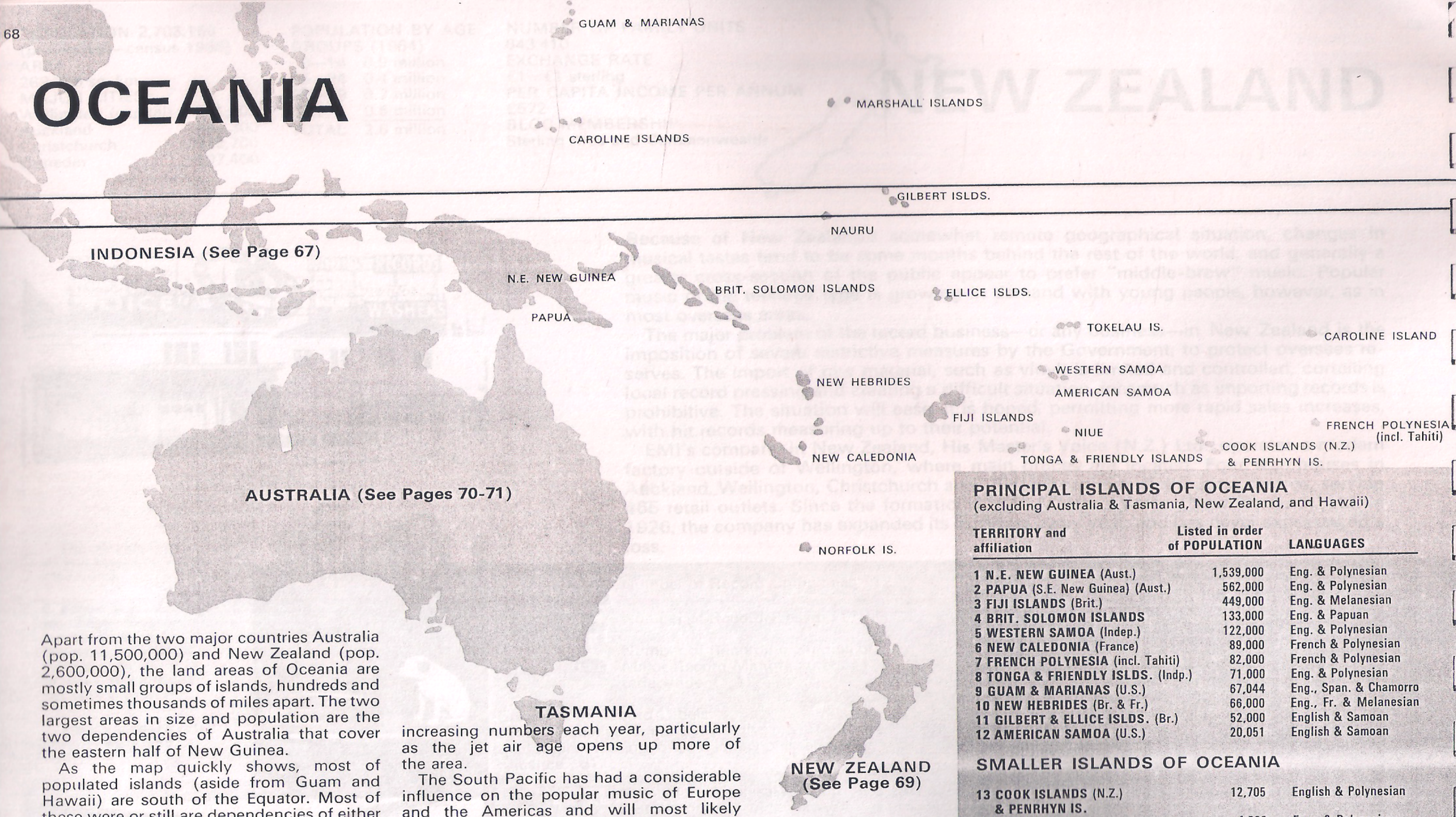
COUNTRY	POPULATION (1966)	AREAS SQ. KMS.	CAPITAL &	POPULATION	LANGUAGES	RECORD FACTORIES
South Korea	29,375,000	99,590	Seoul	3,424,385	Korean, Chinese & Japanese	3
Hong Kong	3,836,000	1,036	Hong Kong		Chinese & English	2
Philippines	33,477,000	300,000	Manila Capital Quezon City	1,356,000 482,000	English, Tagalog & Spanish	5
Taiwan	12,993,000	35,962	Taipei	1,148,590	Chinese	30
South Vietnam	16,543,000	170,805	Saigon	1,371,000	Vietnamese & French	2
Macao	174,000	16	Macao		Portuguese & Chinese	NIL
Cambodia	6,250,000	181,035	Phnom Penh	403,500	French & Cambodian	NIL
Laos	2,060,000	236,797	Ventiane	138,000	French & Laotian	NIL
Thailand	31,508,000	513,996	Bangkok	1,577,000	Thai & Chinese	4
Malaysia	9,675,000	334,756	Kuala Lumpur	500,000	Malay, Chinese, English & Tamil	6
Singapore	1,914,000	580	Singapore	1,079,400	Chinese, English & Malay	3
Indonesia	103,000,000	1,903,642	Djakarta	3,317,562	Javanese, Dutch Sundanese & Madurese	4
Burma	25,246,000	678,577	Rangoon	731,308	Burmese & English	NIL
TOTAL	276,051,000					

South East Asia with a population of 270 million, rapidly increasing from year to year, is a large and complex market with more than a dozen states and spread over a huge area.

Business conditions in the record industry are difficult in this area and need skill and experience to deal with them. Some countries with large populations are critically short of foreign exchange. In others, war and political conditions inhibit the growth of international trade. In some areas record counterfeiters are extremely active, adding to the problems and difficulties faced by the legitimate industry not only in maintaining the authenticity of their product but also in maintaining a stable price structure.

EMI has been long established in this area and the Pathé Chinese labels are justly famous throughout S.E. Asia. With a brand new factory in Singapore and a very active sales distribution and recording set-up in Hong Kong, they are well placed to take advantage of business opportunities in this area. EMI executives from these branches travel the area continuously reviewing distribution arrangements and seeking new outlets for our repertoires. Local recordings in a wide variety of languages and dialects are made. Other EMI companies (notably India) export a large number of pressings to countries in this area.

OCEANIA



Apart from the two major countries Australia (pop. 11,500,000) and New Zealand (pop. 2,600,000), the land areas of Oceania are mostly small groups of islands, hundreds and sometimes thousands of miles apart. The two largest areas in size and population are the two dependencies of Australia that cover the eastern half of New Guinea.

As the map quickly shows, most of populated islands (aside from Guam and Hawaii) are south of the Equator. Most of these were or still are dependencies of either Britain or France and therefore are closely tied by language and commercial activity to the British Commonwealth or the French Community.

There are no record factories or record studios outside of Australia and New Zealand, but records of all kinds from all over the world are imported into these islands and are sold both to the permanent populations (civilian, native and military) as well as to the many tourists who visit the more exotic islands in increasing numbers each year, particularly as the jet air age opens up more of the area.

The South Pacific has had a considerable influence on the popular music of Europe and the Americas and will most likely continue to do so. In these relatively remote areas, music of all kinds is a highly important part of culture and recreation, live, broadcast or recorded. Although the individual markets are small and scattered they add up to an increasingly important segment of the world.

EMI with its strong catalogues of English, U.S. and French material and its long established distribution in Australia, New Zealand, and South East Asia, has heavy representation in the entire area.

PRINCIPAL ISLANDS OF OCEANIA

(excluding Australia & Tasmania, New Zealand, and Hawaii)

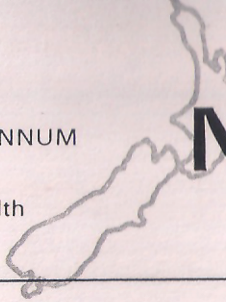
TERRITORY and affiliation	Listed in order of POPULATION	LANGUAGES
1 **N.E. NEW GUINEA** (Aust.)	1,539,000	Eng. & Polynesian
2 **PAPUA** (S.E. New Guinea) (Aust.)	562,000	Eng. & Polynesian
3 **FIJI ISLANDS** (Brit.)	449,000	Eng. & Melanesian
4 **BRIT. SOLOMON ISLANDS**	133,000	Eng. & Papuan
5 **WESTERN SAMOA** (Indep.)	122,000	Eng. & Polynesian
6 **NEW CALEDONIA** (France)	89,000	French & Polynesian
7 **FRENCH POLYNESIA** (incl. Tahiti)	82,000	French & Polynesian
8 **TONGA & FRIENDLY ISLDS.** (Indp.)	71,000	Eng. & Polynesian
9 **GUAM & MARIANAS** (U.S.)	67,044	Eng., Span. & Chamorro
10 **NEW HEBRIDES** (Br. & Fr.)	66,000	Eng., Fr. & Melanesian
11 **GILBERT & ELLICE ISLDS.** (Br.)	52,000	English & Samoan
12 **AMERICAN SAMOA** (U.S.)	20,051	English & Samoan

SMALLER ISLANDS OF OCEANIA

13 **COOK ISLANDS** (N.Z.) **& PENRHYN IS.**	12,705	English & Polynesian
14 **NIUE** (N.Z.)	4,588	Eng., & Polynesian
15 **NAURU** (U.K., Austr. & N.Z.)	4,475	Eng. & Polynesian
16 **TOKELAU IS.** (N.Z.)	1,721	Polynesian
17 **NORFOLK IS.** (Aust.)	1,063	English

Not listed above are the Marshall Islands (U.S.) including such famous atolls as Kwajalein, Bikini and Eniwetok; the Caroline Islands (U.S.) incl. Yap and Truk; and numerous other tiny islands and atolls, none of which have populations nor commercial activity of any importance to this study.

NEW ZEALAND



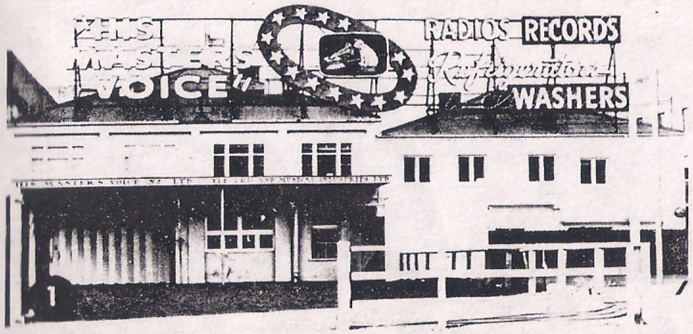
POPULATION 2,703,156
(provisional—census 1966)
AREA
269,359 sq. km.
MAJOR CITIES

Wellington (capital)	261,000
Auckland	482,300
Christchurch	232,700
Dunedin	107,400

POPULATION BY AGE GROUPS (1964)

0—14	0.9 million
15—24	0.4 million
25—49	0.7 million
50+	0.6 million
TOTAL	2.6 million

NUMBER OF FAMILY UNITS
643,410
EXCHANGE RATE
£1=£1 sterling
PER CAPITA INCOME PER ANNUM
£572
BLOC MEMBERSHIP
Sterling Area and Commonwealth



1 The Headquarters of His Master's Voice (N.Z.) Ltd.

2 Father and son—Mr. Alfred Wyness, former Managing Director of HMV (N.Z.), with his son Mr. A. J. Wyness, the present Managing Director.

3 HMV's modern retail store in Auckland.

Because of New Zealand's somewhat remote geographical situation, changes in musical tastes tend to be some months behind the rest of the world, and generally a greater cross-section of the public appear to prefer "middle-brow" music. Popular music of the teenage type is growing in demand with young people, however, as in most overseas areas.

The major problem of the record business—or any business—in New Zealand is the imposition of severe restrictive measures by the Government, to protect overseas reserves. The import of raw material, such as vinyl, is limited and controlled, curtailing local record pressing and creating a difficult situation, inasmuch as importing records is prohibitive. The situation will ease, it is hoped, permitting more rapid sales increases, with hit records measuring up to their potential.

EMI's company in New Zealand, His Master's Voice (N.Z.) Ltd., operates a modern factory outside of Wellington, where main offices are located. Four warehouses in Auckland, Wellington, Christchurch and Dunedin serve as distributing centres, serving 465 retail outlets. Since the formation of His Master's Voice (New Zealand) Ltd. in 1926, the company has expanded its business every year, and has never experienced a loss.

Number of Record Companies 12

Number of Record Pressing Plants 4

Number of Recording Studios of Major Record Manufacturers 1
Independent 4

Number of Record Labels
Indigenous labels currently active 6
Additional foreign-owned labels pressed under licence 61

Number of Wholesale Record Distributors 11

Number of Retail Record Outlets 465

Number of Record Clubs 3

Estimated number of Record Players 390,000
Number sold annually 15,000—20,000

Total number of Juke Boxes in operation 296

Number of Records Manufactured (1966) 3,294,000
Total value of Record Sales 1965 £1,820,000

Mix of Records Manufactured 1966

7" 45 rpm	1,834,000
12" LP	1,460,000
	3,294,000

Popular 90%
Classical 10%

Number of Radio Stations 46 Govt. owned; 1 Private and 1 'Pirate' Station

Radio Receiver Ownership 100% of homes

Television broadcasting of records
4 Govt.-owned TV Stations
Number of TV sets 400,000

Miscellaneous
Number of Music Publishers 8
Motion Picture Theatres 301
Music licence:
Australian Performing Rights Assn. Pty.

AUSTRALIA

POPULATION
11,544,691 (1966)
AREA
7,686,881 sq. km.

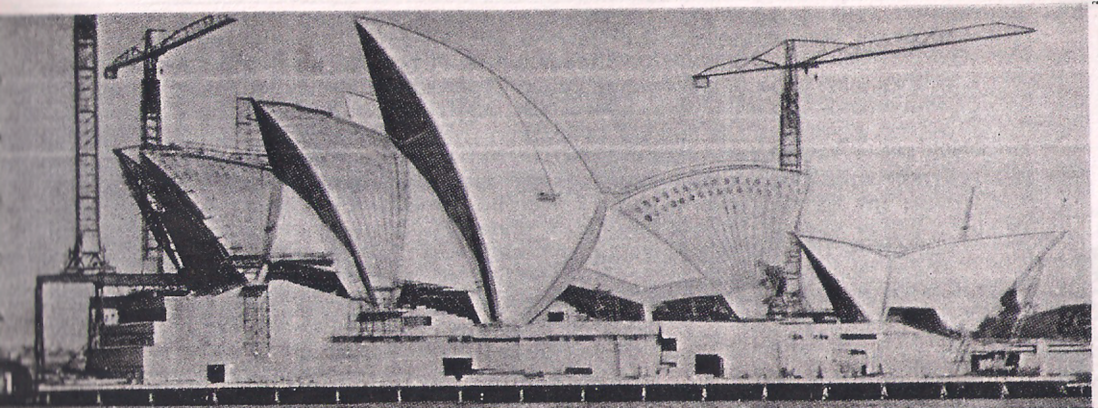
MAJOR CITIES

Sydney	2,444,735
Melbourne	2,108,499
Adelaide	726,930
Brisbane	719,140
Perth	499,494
Newcastle	233,967

POPULATION BY AGE GROUPS (1965)

0—14	3.3 million
15—24	1.8 million
25—49	3.6 million
50	2.6 million
TOTAL	11.3 million

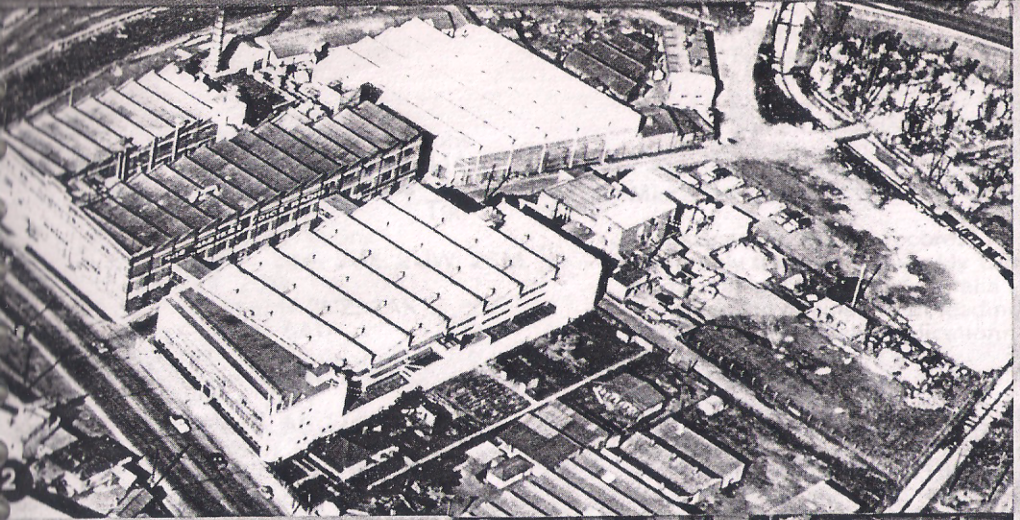
NUMBER OF FAMILY UNITS (1961 census)
2,781,945



Australia, a vast country and continent, has been a remote and relatively unknown market to many until recent years, when the jet planes speeded travel and communication. A country of almost three million square miles, its population is less than 12 million, fewer than countries a tenth of its size. Australia therefore presents "a land of opportunity" to many, for its per capita income is relatively high and the economy continues to expand at a gratifying rate in recent years.

Australia's pop record market has always been strongly influenced by overseas trends, particularly from England and America, where language is the same and cultures similar. Recently, however, domestic artists and recordings have not only achieved hit sales locally but have reached high positions on international record charts.

There is a great interest in Australia in "country and western" music. C & W



1 The new Sydney Opera House under construction.

2 Aerial view of the manufacturing plant of EMI (Australia) Ltd. at Homebush, New South Wales.

3 Record packing at EMI (Australia) Ltd.'s factory.

Number of Record Companies
Major 7 Others 6

Number of Record Pressing Plants 7

Number of Record Labels
Indigenous labels currently active 8
Additional foreign-owned labels pressed under licence 75

Number of Recording Studios of Major Record Manufacturers 4
Others doing significant recording 5

Number of Wholesale Record Distributors 6

Number of Retail Record outlets Approx. 1,400

Number of Record Clubs 4
Sales estimated at 12% of production of 12" LPs
Another 12% for special merchandisers (e.g. Reader's Digest).

Estimated number of homes with Record Players 1,700,000

Number of new record players sold annually 128,695 (1965/66)

Total number of Juke Boxes in Operation Approx. 1750

Number of Records Manufactured

	1965/6	1966/7
7" Singles	4,295,666	4,635,000
7" EPs	1,483,681	2,099,000
10" LPs	37,481	31,900
12" LPs	5,059,316	6,679,000
Total	10,876,144	13,444,900

Records Sold
(Estimated for year ending 30.6.66)

7" Singles	4,080,883
7" EPs	1,409,497
10" LPs	335,607
12" LPs	4,806,351
Total	10,632,338

Retail value of records sold (Estimated for year ending 30.6.66) $28,382,324

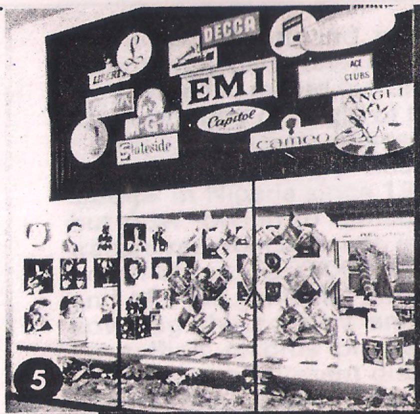
Mix of Records Manufactured
Popular 90% Classical 10%
Domestic and export
Domestic 96.5%
Export 3.5%

EXCHANGE RATE
£1 2.5 Australian Dollars
PER CAPITA INCOME PER ANNUM
£552
BLOC MEMBERSHIP
Not a member of an Economic Bloc
but a member of G.A.T.T.

AUSTRALIA

artists tour the "outback" areas where entertainment is scarce and personal appearances pay off in devoted fans and record buyers.

The record industry in Australia has for many years enjoyed price stability and "orderly" marketing practices. There are seven major record companies, releasing mostly overseas labels. EMI (Australia) Limited is the industry leader, producing approximately 40% of all records manufactured *and enjoying almost 50% of the total retail business.* The company started in 1925, and has dominated the market, with its home office in Sydney, and branches in the state capitals of Melbourne, Brisbane, Adelaide, Perth and Hobart, as well as Newcastle, NSW, and Launceston, Tasmania. Manufacturing is centred in Homebush, with recording studios in Sydney and Melbourne. During 1966 EMI labels averaged 17 to 18 of the top weekly chart positions, or 45% of the top hits . . . more than double its nearest competitor.



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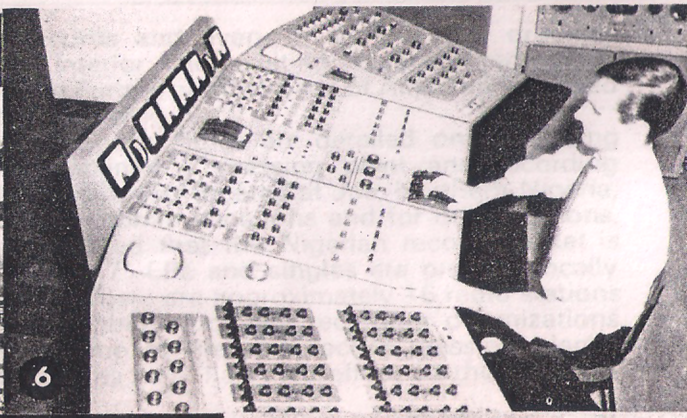
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Number of Radio Stations
Commercial Stations 111
Government Stations 79
190

Principal Stations
Sydney 2GB, 2UE, 2UW, 2SM, 2KY, 2CH
Melbourne 3UZ, 3AK
Adelaide 5AD
Perth 6PR
Brisbane 4BC
Hobart 7HO
Network ABC (Government, National)

Radio Receiver Ownership
Approximately 100% of homes

Television
Commercial Stations 33
(Channels 0, 3, 6, 7, 9, 10)
Government Stations 26
(Channel 2)
Total 59 (All VHF)
Approximately 2,045,000 homes own a TV set

Pre-recorded tape
Types available
Mono and Stereo Reel-to-Reel
2 and 4 Track
Some cartridges both 4 or 8 track

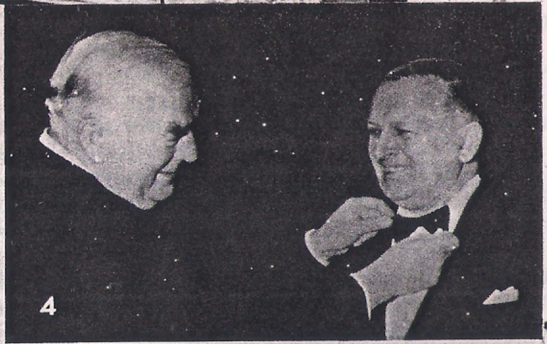
Miscellaneous

Magazines devoted to records
1 Monthly trade and 2 weekly Consumer magazines published in Australia
Considerable circulation of leading American and British Publications

Music Publishers
82, of which 8 are large

Theatres
Motion Picture Theatres 1183
"Live" Theatres 40

Music Trade Associations
C.O.R.S.
(Copyright owners reproduction Society)
F.A.C.T.S.
(Federation of Australian Commercial Television Stations)
A.A.R.M.
(Association of Australian Record Manufacturers)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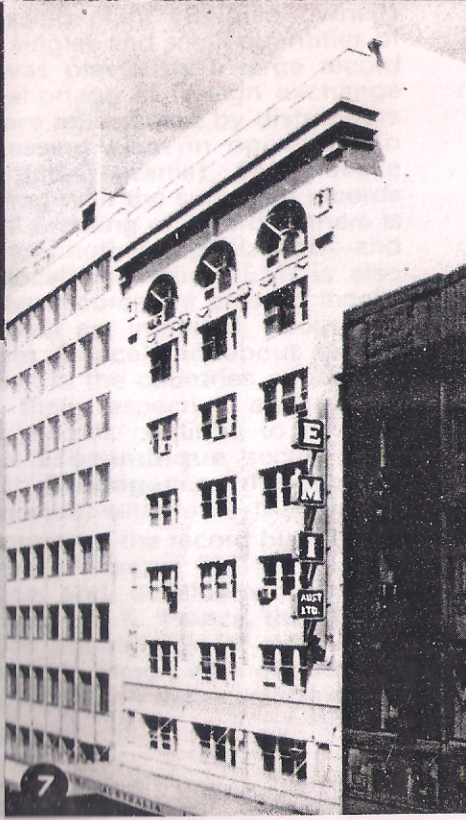
Music Licensing Organization
A.P.R.A.
(Australian Performing Right Association Ltd).
Musical Copyrights issued by
Commonwealth Controller of Copyright



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4 Sir Robert Menzies, then Prime Minister of Australia, with Mr J. M. Burnett, C.B.E., Chairman and Managing Director of EMI (Australia) Ltd.

5 Record display at the British Exhibition, Sydney.

6 Recording technician at the console of his equipment in EMI (Australia) Ltd.'s studios.

7 Head office of EMI (Australia) Ltd., Sydney.

AFRICA

1 A Bantu recording session.
2 & 3 Sir Joseph Lockwood, Chairman of EMI, on a visit to EMI's plant in Nigeria.

Africa is a vast continent no less than three times the size of Europe and with a total population in excess of 300 million. U.N. estimates predict that this will increase to over 500 million by the end of this century. This huge area is made up of a multiplicity of races, tribes, cultures and languages from the Arab nations of the Mediterranean seaboard to the white civilization of South Africa in the far south. Much of it is still underdeveloped and since World War II, the African continent has been the scene of constant political change—and in some areas strife—as many new nations have been created from former colonies.

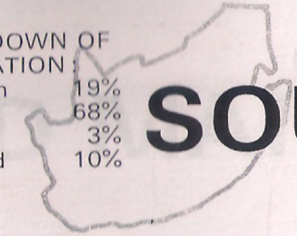
A recent estimate put the total value of the record markets of the African continent at about £8.0 million but well over half of this sum is accounted for by prosperous South Africa and further substantial proportions by Algeria and Nigeria. In other parts of the continent, the record industry is not measurable in terms of local factories, recording studios etc., as in many cases the trading links of independent countries have continued in some measure with the countries of which they had previously been colonies. Large general trading companies, operating in a number of countries, import and sell records and even, in some cases, organize recording expeditions into the interior. The resulting vernacular recordings are pressed in record factories in Europe or other parts of Africa and shipped to the country of origin of the recording.

EMI's extensive interests in South Africa are detailed on the facing page. The company has maintained a pressing plant and recording studios in Nigeria since 1962, previously located at Jos, Northern Nigeria, but now, owing to difficulties in communications and for other reasons, transferred to Lagos. It is estimated that the Nigerian record market is worth about £350,000 annually. 7″ EPs and singles are pressed locally and LPs are generally imported. There are approximately 16 radio stations covering the country and a number of private recording organizations have their records pressed in one of the two record pressing plants. Inevitably, the present disturbances have had their effect on the development of this market.

In the **Congo** there is one record pressing plant (Belgian owned) and here it is estimated that about 700,000 singles and small quantities of EPs and LPs are sold annually. **Ghana** was previously a large record market for imported records but a severe shortage of foreign exchange has cut down this business severely. EMI are represented by distributors in this territory. There is also a small pressing plant in operation. In **East Africa** (including Kenya, Uganda and Tanzania), EMI have a newly opened branch office in Nairobi dealing with the supply of records from other EMI factories and with the local pressing of records—there is one pressing plant in Nairobi belonging to another organization—and several recording studios specializing in local repertoires. EMI is also represented by distributors in **Zambia** where records are pressed locally for our distributors. In **Mauritius** all records are imported, about one third from the U.K., twenty per cent from France and about twelve per cent from India, and the EMI companies in the countries concerned maintain distribution arrangements with their respective agents. No statistics are available for **Rhodesia** but records continue to be sold from South African sources. **Angola** and **Mozambique** secure their records from Portugal and South Africa. In **Madagascar** the pressing plant in Tananarive has a local pressing agreement with Pathé-Marconi.

This brief survey has only outlined EMI activity in the record business in Africa. Many visits are made by executives of various EMI companies both in connection with the maintenance and development of the existing export business of EMI companies in the U.K., France, the Middle East and India and also to examine future possibilities for productive investment in plant and recording facilities. In common with other major international companies, EMI keeps a close watch on the development of this important continent.

SOUTH AFRICA



POPULATION
18,298,000
AREA:
1 221,037 sq. kms.
MAJOR CITIES:

Johannesburg	1,152,525
Cape Town	807,211
Durban	681,492
Pretoria (Capital)	422,590

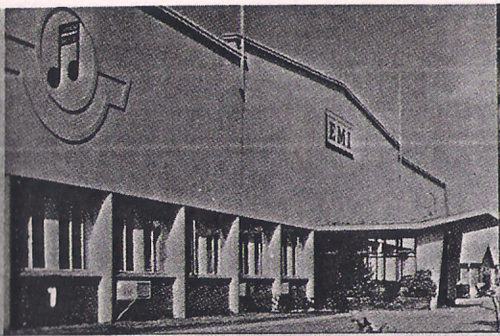
POPULATION BY AGE GROUPS: (1960)

0—14	6.4 million
15—24	2.9 million
25—49	4.8 million
50 :	1.9 million
total	16.0 million

NUMBER OF FAMILY UNITS:
4.5 million
EXCHANGE RATE:
£1=2 rands
PER CAPITA INCOME
PER ANNUM: £181
BLOC MEMBERSHIP:
None

BREAKDOWN OF POPULATION:

European	19%
Bantu	68%
Asiatic	3%
Coloured	10%



To a large extent, trends in popular music in South Africa follow the pattern set by the United Kingdom and the United States. The country represents a record market of approximately fifteen million dollars (U.S.) for 1966, served by three major and five smaller record companies. There are four major cities, comprising about 20% of the population. The bulk of the record business is done in these centers, especially the largest city Johannesburg, with over a million population.

Though the bulk of the records are influenced by U.S. and U.K. imports, Swahili and Congo repertoire sells in some areas, and African music, mostly "jive" and to a lesser degree, traditional.

EMI's South African company, EMISA, maintains headquarters in Johannesburg, serving the entire country. The company manufactures and distributes its own labels—UITSPAN, UMSAKAZO and N'KANYESI—as well as all EMI labels, and, by licence, many others. Although somewhat remote from EMI headquarters, frequent trips are made by EMISA executives to London, and modern production and merchandising methods are an integrated part of this company's activities.

EMISA sells one in five of records sold in the South African market.

Number of Record Companies 8
Majors 3
Others 5

Number of Record Pressing Plants 6

Number of Recording Studios of Major Record Manufacturers 2
Others 3

Number of Record Labels
Indigenous labels currently active 29
Additional foreign-owned labels pressed under licence 99

Number of Wholesale Record Distributors 6

Number of Retail Record outlets
Approx. 2,500

Number of Record Clubs 2
Number of Rack Jobbers 6

Estimated number of Record Players
1 million
1965 Production 80,000.

Total number of Juke Boxes in Operation 200

Number of Records Sold

	Units	Retail Value £
1964	5,179,918	£4,762,181
1965	5,612,097	£5,365,741
1966	5,805,877	£5,386,557

Sales by type (1966)

7"	31.9%
7"EP	3.3%
10"78	29.3%
12"33	35.5%

Number of Radio Stations
S.A. Broadcasting Corporation controls, operates Radio S. Africa. There are four national services in English, Afrikaans and Bantu and two of these are commercial services. Additionally there are three regional services Radio Highveld, Radio Port Natal and Radio Good Hope. Also Radio Lourenço Marques operates a commercial service beamed to S. Africa.

Radio Receiver Ownership
Approx. 60%.

Pre-recorded tape.
Types available Mono/Stereo reel-to-reel.
Cartridges now appearing.
Sales in recent years.
Approx. 15,000 units.
Number of playback units.
Approx. 450,000.

Miscellaneous Music Business

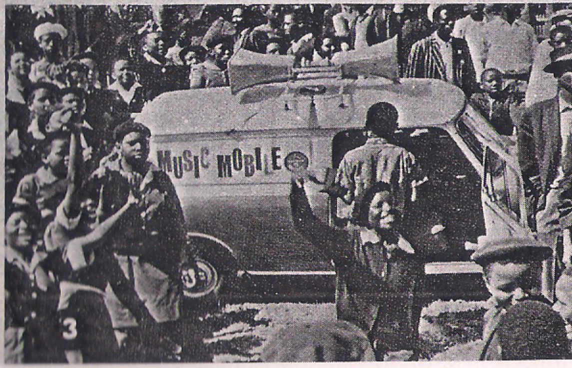
Music Trade Associations:
S. African Record Manufacturers and Distribution Assn.
Association of S. African Phonographic Industry.

Music Licensing Organisations:
S. African Recording Rights Association Ltd. (SARRAL)
S. African Music Rights Organisation Ltd. (SAMRO).

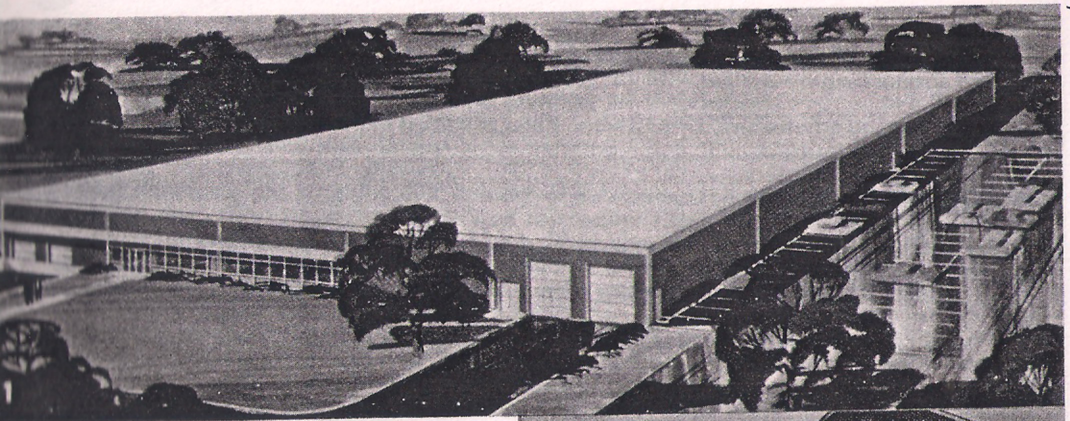
Copyrights:
Musical are registered with SAMRO.

Theatres:
Motion picture 300, Others 12.
Attendance high because there is no T.V. service.

1. E.M.I.'s factory and offices in Johannesburg.
2. Part of the 7" press room of the Johannesburg factory.
3. A Music Mobile recording promotion van entertaining Africans.



RECORD CLUBS...AND MAIL ORDER



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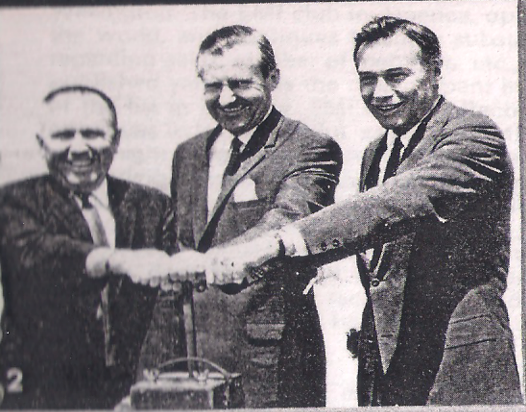

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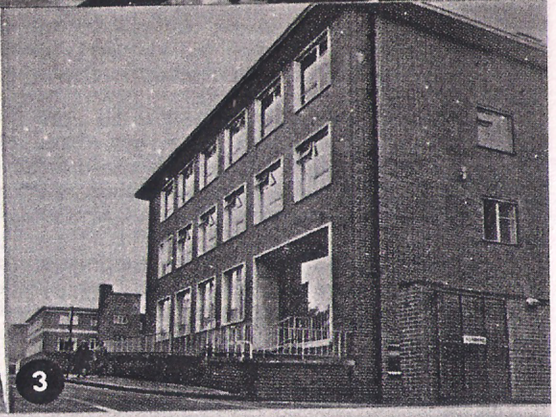

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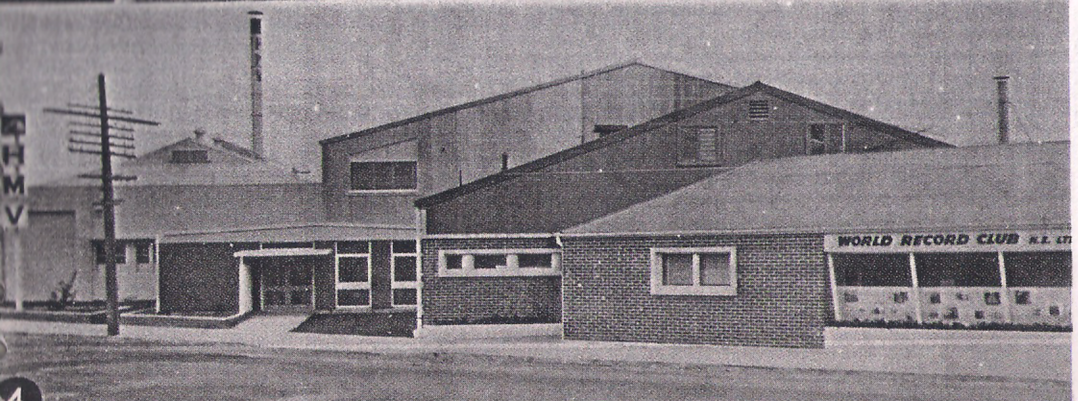

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Record Clubs have been a mystery to many people associated with the recording business. Here, perhaps, is the first opportunity to classify what a record club **is,** how it operates, and other pertinent facts, including a word about profits and royalties.

A record club is a form of **mail order selling**—nothing more or less. Mail order selling has been with us for at least a hundred years, in many forms. In the days of breakable 78s, mail order was not too practical, but with the advent of long playing records pressed on flexible vinyl, clubs began to appear and prosper, following the pattern established by older book clubs.

Compared with the more traditional way of selling records through distributors and dealers, record clubs offer these differences:

A The "sales force" of a club is advertisements in publications, or mailing pieces sent to selected lists of possible buyers. As such, while making more "calls" than salesmen, mail order is infinitely less selective and less productive, hence higher in cost. Of every 100 mail order calls made, there may be two or three responses, and perhaps one develops into a regular club purchaser of records. The remaining 97 or 98 have been exposed to the record exploitation and a portion of them will be motivated to making later purchases at a retail store, which has been selling these records usually for several months prior to the club offering. Considering the millions of mailing and advertising impressions created by the activities of a large record club, one can appreciate what a formidable and effective advertising force it comprises.

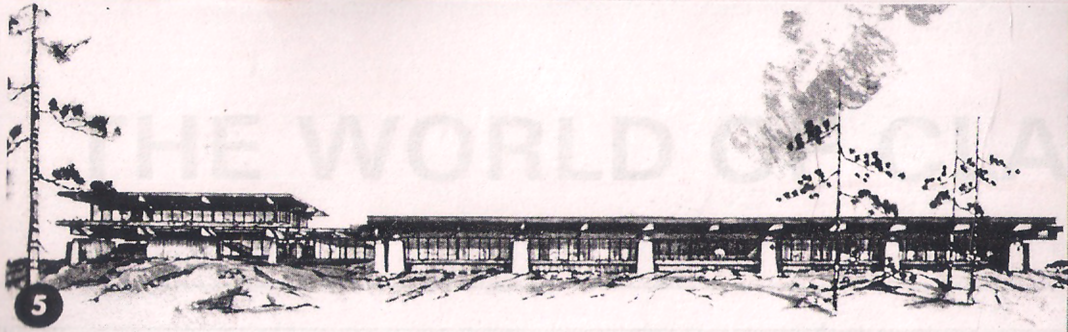
B The typical record club member is an older man or woman who does not know what the current "hit" records are, doesn't hear the radio often (he more likely watches television), and is in a small town where there is often no record outlet at all. Record club sales are **plus** sales in that they reach people who would ordinarily not buy records at all.

C Record clubs are one of the most successful outlets for a record company's "catalog" of previously released records which may not sell well, if at all, in retail stores. They provide an outlet for unsold albums previously manufactured for retail distribution and give valuable exposure to "good music" artists who may not have current hits. They thus render a service to an artist in providing a second outlet for continuing income even when the artist does not have a current hit, and to the consumer in making available albums that would otherwise be difficult to locate, in communities that might not otherwise have any retail distribution at all.

D Record clubs create sales, by reaching people who are not thinking about buying records—who do not know of new records offered and in some cases, do not even have a phonograph and are inclined to buy one through a club offer.

E Because there is not the opportunity to hear records offered by clubs, inducements must be offered to stimulate action, in the form of free records and other devices. This frequently has a tendency to make record club advertising lurid in its presentation of fantastic bargains, particularly as the copy-writers of major clubs compete with each other for the same potential members. However, unlike store purchasers, record club members in America obligate themselves by contract to buy at full list price in such quantity to assume reasonable profit to the company and artists concerned.

May we emphasize again the **power** of record club advertising to sell records through **every** outlet. The huge Capitol Record Club in America and Canada, for example, is currently spending over seven million dollars a year in advertising record albums and featuring artists! Last year, literally billions of "advertising impressions" were made



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on potential buyers! Without such a club, no such astronomical sum could be contemplated—indeed, smaller record companies must turn to larger organizations for this essential club exposure, for profits and royalties for their artists.

Like any highly competitive business, mail order clubs come and go . . . they become large, or grow smaller and disappear, depending upon the skill with which they are operated, and the product offered.

EMI has major record clubs in a number of countries. The EMI Club in Great Britain is called the World Record Club. It was formed in 1955. As opposed to many other clubs its recordings are issued on a club label and are not widely available in retail stores. Nearly every release is issued on tape also and the tape catalogue is probably the largest in Europe. World Record Club issues a quarterly magazine containing articles on topical musical events and music appreciation. To help formulate its programme and releases the club has a panel of musical experts, including Marion Lady Harewood, Sir Arthur Bliss and other well-known musical personalities. Soon after its formation it extended its activities to Australia where it opened branches in all the main cities. A little later it spread to New Zealand, with branches in Auckland and Wellington. The EMI club in America, operated by Capitol, is one of the two largest in the world, and continues to show substantial growth each year. Record club figures regarding sales, number of members, etc., are jealously guarded and therefore, the only published yardstick is the dollars spent in advertising. In 1966, Capitol was at the top of the list in America. EMI's World Record Club in Australia is one of the oldest and continues to be successful, as are the EMI clubs in the United Kingdom and elsewhere.

It might be mentioned here that some countries maintain clubs and some do not, depending upon local conditions. In certain areas, mail order credit offers insurmountable problems . . . post office facilities are unreliable, and there are other aspects which make the business impractical.

However, EMI record clubs are constantly testing new marketing devices—including door to door selling and delivery of records, and distribution through established credit sources—to bring record clubs and their many benefits to every country in the world where they would be beneficial to overall record sales.

1 Capitol Record Club's modern fulfilment centre at Champaign, Illinois, only a few hours by truck and rail from Capitol's fully automated pressing plant at Jacksonville, Illinois.

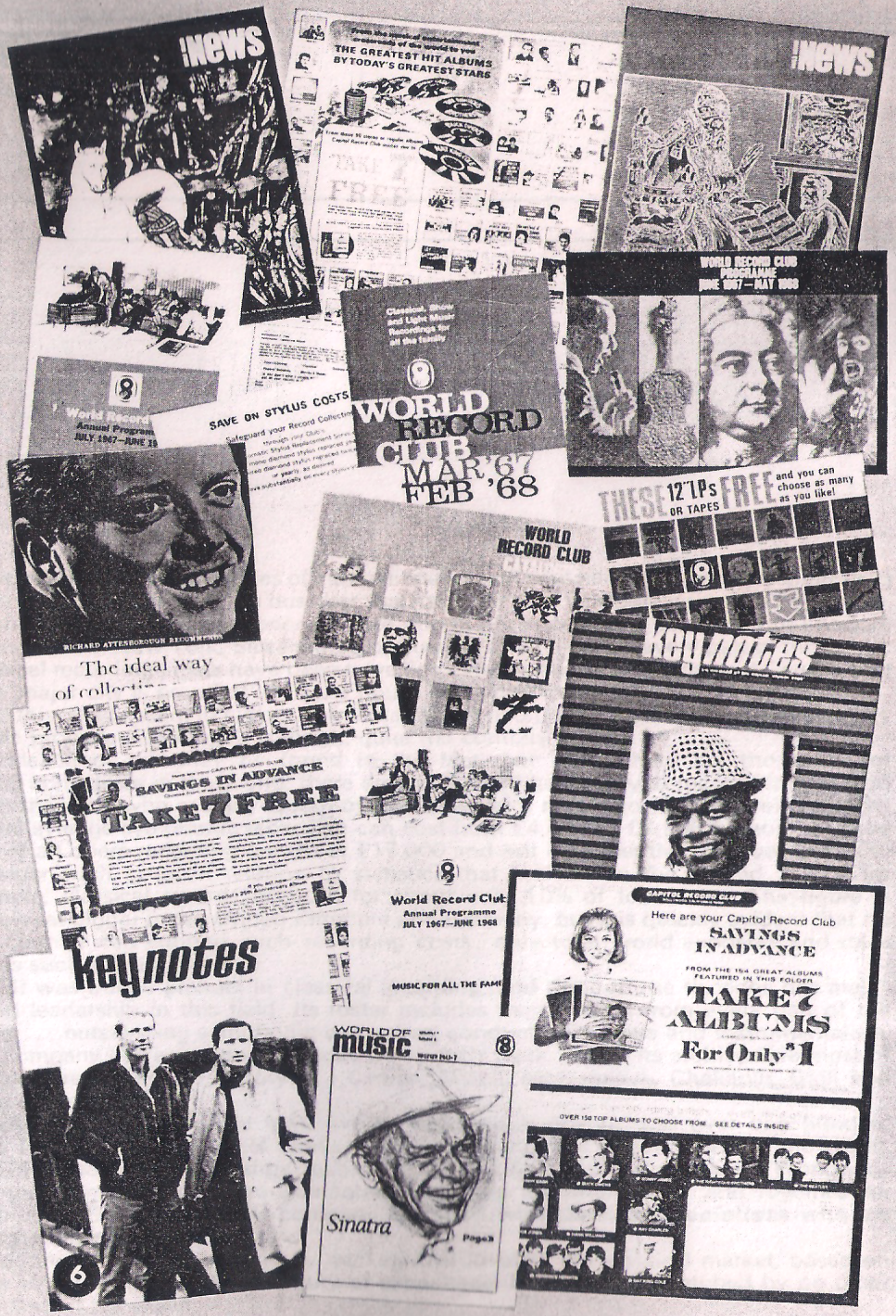
2 Left to right: Glenn Wallichs, Founder and Chairman of the board of Capitol Records, with John Read, Group Managing Director (U.K.) of EMI, and Alan Livingston, Capitol's President, prepare to press the trigger that broke ground for the new Capitol Records Club facility at Rancho Conejo in the northwest section of Greater Los Angeles, July, 1967.

3 Headquarters of the World Record Club on Richmond Common on the outskirts of London.

4 The World Record Club's premises in New Zealand.

5 Architect's rendering of the main building of the new Capitol Record Club complex in Los Angeles. Ground-breaking ceremonies were held in July 1967 with opening scheduled for January 1968. The main building will include a complete computerized mail order processing centre, the largest direct mail distribution operation in the area.

6 Some samples of record club mailing pieces and club literature from Great Britain, Australia and the U.S.A.



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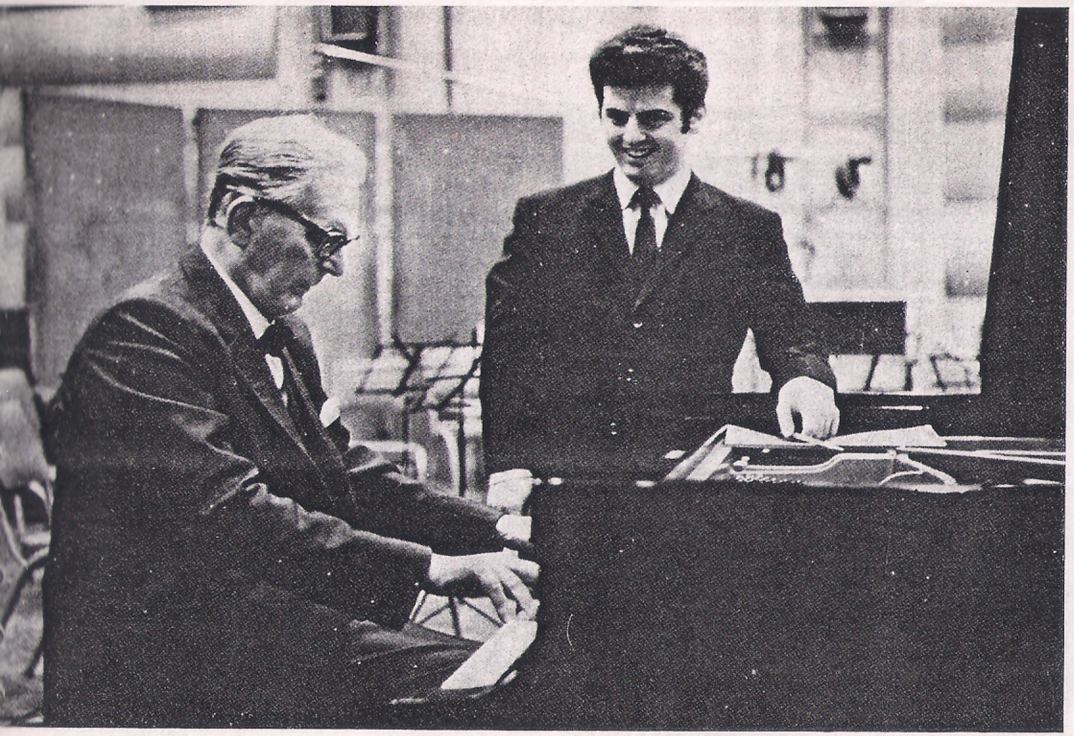
THE WORLD OF CLASSICS



Dr Otto Klemperer in an unfamiliar role with Daniel Barenboim looking on

In coping with the complexities of international record marketing, it is perhaps comforting to come upon a branch of the business that has been truly worldwide since its beginning. For the great symphonies, concertos and operas are known and performed in London, Milan, Vienna, New York, San Francisco, Buenos Aires, Tokyo—every part of the world. Classical recording artists have been travelling extensively since the days of Caruso, and every major city is proud of its opera house and symphony hall.

All this would seem to make the international marketing of classical music a relatively simple procedure. Strangely enough, quite the contrary is true.

Evidence of this may be found in the fact that while there are thousands of record companies in the world, there are but a small handful who record classics, and fewer than five who actively record operas. The major reason for this is surely financial for the average symphonic recording can cost from £4,000 to £7,000 or more, and the cost of an opera recording begins at £17,000 and not infrequently runs over £35,000. Consider such costs in relation to statistics that indicate in the United States, for example, classical records account for about only 10% of total sales. The figure is somewhat bigger in the United Kingdom and Germany, but it is quickly evident that no one country can support such recording costs; only total world exposure and sales makes such activity possible.

EMI was truly a pioneer in classical recording, and through the decades has maintained leadership in this field. Its roster includes major artists from every part of the world . . . outstanding symphonic orchestras, conductors, singers and instrumentalists. The company has a genuine **dedication** to such work, and in its archives are most of the great recordings of history . . . Caruso, Melba, McCormack, Chaliapin, Gigli and Lotte Lehmann.

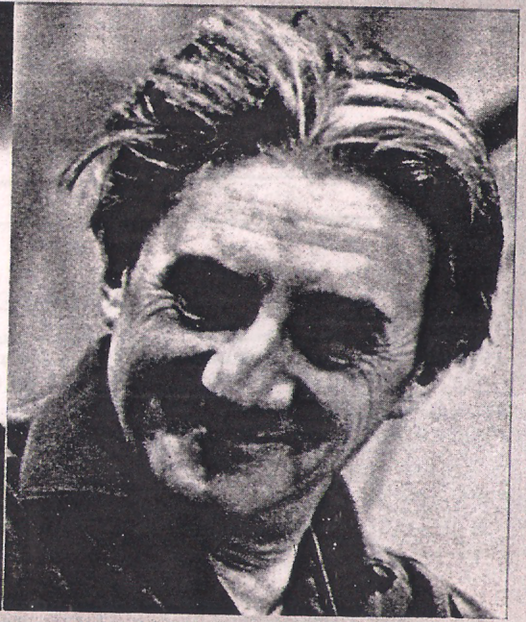
Every year, EMI records from five to eight major operas, and over one hundred other instrumental and vocal works. Artists are contracted in every part of the world, by EMI executives, to arrange recordings, to aid in tours and publicity. Worldwide releases of major works are guaranteed, assuring maximum sales and royalties for performers. Every major EMI company is staffed with classical **specialists** who are educated, dedicated people.

Country by country, market by market, EMI **knows** the classical market, based on close to three quarters of a century of experience. It is a record matched by no other company in the world.

Franco Corelli

Nicolai Gedda

Elisabeth Schwarzkopf



Sir John Barbirolli

Maria Callas

Yehudi Menuhin

Dietrich Fischer-Dieskau

Victoria de los Angeles

OTHER ACTIVITIES OF EMI

The roots of EMI are planted deep in the home entertainment business, for the origins of EMI companies run back into the earliest days of sound recording.

However, with the introduction of electrical techniques into sound recording and sound reproduction, the EMI Group became involved in many aspects of electrical and electronic science. As a result, the activities of the Group now extend far beyond sound recording and sound reproduction, although this still represents a major section of Group interests and contributes enormously to the consistent growth of the organization.

A few of EMI's other important activities are enumerated below, but it should be appreciated that this book is intended only for the Record Industry.

MUSIC PUBLISHING

Selling records is basically selling music and words. A good artist must have a good song—a great musician must have great music to interpret.

The gathering together of the best new compositions is therefore a priority in the record industry. This fact is absolutely vital when it comes to pop music.

If you have a first-class artist, a first-class song must be provided to enjoy his full potential. If you have a first-class song then a first-class artist must be employed to make the most of it.

Long since EMI realized the importance of music publishing as an essential adjunct to record production. EMI have therefore set up an international network of their own music publishing companies, which is a rapidly growing division of the Group's interests.

Many of EMI's recording artists write and compose their own songs: these they gladly assign to their local EMI Group Publishing Company for world-wide promotion.

But in addition to publishing new compositions by EMI recording artists, our publishing companies work very successfully to find good material for artists from other sources. Furthermore, the Group publishing companies enjoy outstanding success with other recording companies, thereby co-operating with many of the world's greatest song writers.

This is an aspect of EMI development which is growing fast. The following list of EMI Group music publishing centres clearly shows the truly international scope of this vital activity. It is a field in which EMI intend to expand quickly and extensively:

EMI GROUP MUSIC PUBLISHING HOUSES

Anagon, N.V.,
Heemsteedse Dreef 287,
Heemstede, Holland

Ardmore & Beechwood Ltd.,
363 Oxford Street,
London, W.1., England

S.A. Ardmore & Beechwood (Belgium),
72 Quai des Charbonnages,
Brussels, Belgium

Ardmore & Beechwood
(South Africa) (Pty) Ltd.,
P.O. Box 11254,
32 Steele Street, Steeledale,
Johannesburg, Transvaal,
South Africa

Arion Greek Music Company Ltd.,
P.O. Box 287,
Athens, Greece

Beechwood Music Corp.,
1750 North Vine Street,
Hollywood, California, 90028,
U.S.A.

Beechwood de Mexico S.A.,
Ayuntamiento 54,
Mexico City 1, D.F.,
Mexico

Belcas Music Ltd.,
P.O. Box 30698,
408 Hutt Road,
Lower Hutt,
Wellington,
New Zealand

Castle Music Pty. Ltd.,
White House,
403 George Street,
Sydney, N.S.W. 2000,
Australia

Edition Accord,
Hohenstaufenring 63,
Cologne 5, Germany

E G O Musical S.A.,
Urgel 234,
Barcelona 11, Spain

Edition Odeon,
Oxenstiernsgatan 37,
Stockholm, Sweden

Editorial Musical Odeon,
Av. Corrientes 485,
Buenos Aires, Argentina

Edizioni Musicali La Voce
del Padrone,
Piazza Cavour 1,
Milan 20121, Italy

Imudico A/S,
Colbjørnsensgade 19,
Copenhagen V, Denmark

Les Éditions et Productions
Musicales Pathe-Marconi,
19 Rue Lord Byron,
Paris 8e, France

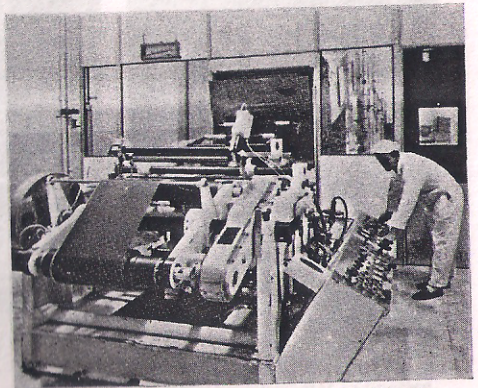
Pathé Publications (Far East) Ltd.,
P.O. Box 14694,
308 The Chartered Bank Building,
Hong Kong

Sociedade Brasileira de Edicoes
Publicidade e Servicos
Artisticos Ltda,
Rua Evaristo de Veiga 20-1° andar,
Rio de Janeiro, Brazil

MAGNETIC RECORDING TAPE

The EMI Group's interest in magnetic recording tape dates from 1945 when EMI research teams created the forerunner of the highly sophisticated Emitape product of today's generation, by applying its background knowledge of sound recording techniques developed originally in pre-war Europe.

Full-scale production of Emitape magnetic recording tape commenced in 1948, and although initially supplied only to professional



The re-wind section of a tape coating machine.

OTHER ACTIVITIES OF EMI *(cont)*

recording users this was soon extended to enable domestic users to derive the same high standards of recording.

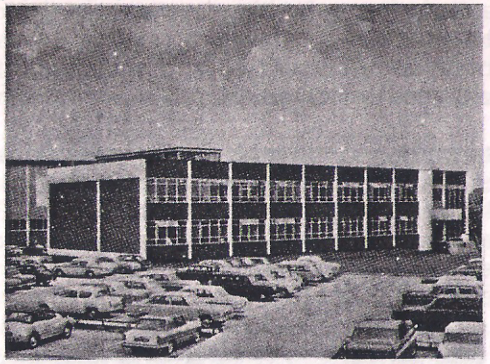
Prior to 1956 the application of magnetic recording tape was confined to the audio field, but in that year a major breakthrough in the video field was made by the Americans. Work on this new development was undertaken by EMI research teams, and by 1960 the manufacturing techniques of Emitape for video recording had advanced to a stage whereby EMI were recognized as one of the world's major suppliers.

At this stage EMI Tape Limited was formed to exploit the rapidly expanding magnetic recording tape activities of the Group.

More recently the world-wide growth of computerization has provided a further opportunity for expansion, and Emitape Industry Compatible Computer Tape has been developed specifically to fill this need.

Emitape products, which are sold and used by professional and domestic users throughout the world, are manufactured in a modern factory at Hayes, Middlesex.

The fact that the EMI Group have been involved with magnetic recording tape and its wide range of applications since the earliest days of development, and have established an acknowledged position as one of the world's leading manufacturers, confirms the importance of the Group's continuing investment in this field.



The Tape Manufacturing Company Ltd. Administration, laboratory and factory buildings, Hayes, Middlesex.

RACK JOBBING

MUSIC FOR PLEASURE LTD was formed in September 1965 and is a 50/50 joint venture between EMI Records and Paul Hamlyn (Holdings) Limited, which is a subsidiary company of the International Publishing Corporation (one of the largest publishers in the world).

The Music for Pleasure label was launched in October 1965 with the intention of capturing the then comparatively small budget price market. All records are 12" LPs retailing at 12/6.

The repertoire is limited to approximately 150 different selections consisting primarily of recordings deleted from EMI's current catalogue, but supplemented by a small number of specially recorded items.

Both classical and popular music are represented in the catalogue in approximately equal quantities.

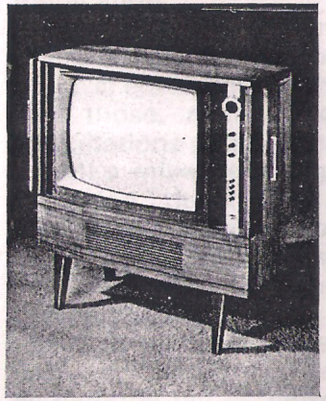
Music for Pleasure is now the largest selling budget price label in the United Kingdom, having sold over 6 million LPs in two years. This success has been achieved by the strength of the specially selected repertoire (supplied by EMI Records), the high quality of the cover designs and the aggressive approach to marketing and selling through additional channels (i.e. bookshops, department stores, tobacconists, etc.), for which the Hamlyn Organization is responsible.

DOMESTIC EQUIPMENT

Vast quantities of a wide range of domestic equipment are produced under various EMI Group trademarks.

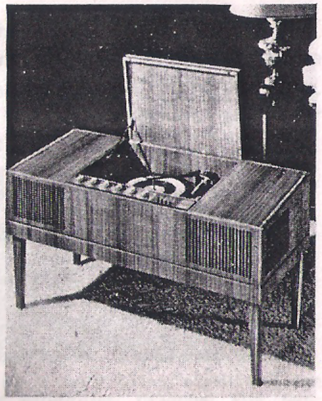
Among these products HIS MASTER'S VOICE and MARCONIPHONE radiograms, radio and television sets enjoy the very highest reputation in their field, for these two famous names have been pre-eminent in home entertainment since the earliest days of the gramophone and radio.

Large quantities of other domestic electric appliances not connected with the entertainment industry are sold extensively under the well-known EMI-owned trademark MORPHY RICHARDS.



An HMV 23" television receiver.

A Marconiphone transistor radio.



The HMV Stereomaster radiogram with VHF stereo and mono radio.

OTHER ACTIVITIES OF EMI *(cont)*

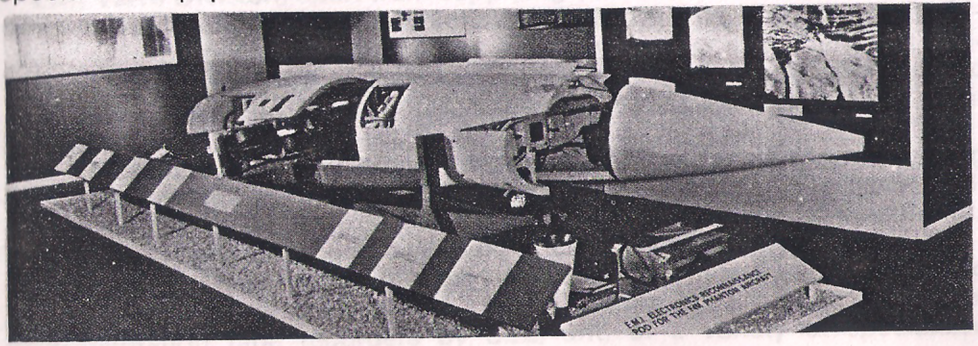
ELECTRONICS

Finally an extensive and extremely specialized section of EMI activity is in the realm of ELECTRONICS, where the Group company—EMI ELECTRONICS LTD—produce a wide range of highly technical products.

An essential link between those early days of electronics and the EMI electronics of today is rooted in television. Though EMI would be the last to decry the enthusiasm of Baird in bringing limited mechanical techniques to fruition, it was the similar enthusiasm, coupled with access to electronic techniques, of Sir Isaac Shoenberg, of Alan Blumlein, and of others who are still with EMI, which simultaneously brought a new dimension to entertainment in the home and forced a new standard of technique upon the electronic and communication industries.

In 1939 the forefront in television became the forefront in radar, and EMI had the chance to serve the country in earnest with the techniques developed for entertainment in peacetime. During the war the horizons of electronics were extended both by the applications of the techniques to data processing, and by the development of new components to meet the increased demands.

When, after the war, the violent fluctuations of demand for new equipment settled down, EMI gradually established themselves in four particular areas. The first of these, for the RAF, is concerned with the gathering of information, radar and visual, by reconnaissance aircraft. Before its demise EMI had designed these facilities into the TSR2: since then they have undertaken to provide the Phantom aircraft and the F111K with the specialized equipment to enable them to fulfil their reconnaissance role.



The EMI Electronics reconnaissance pod for the F4M Phantom aircraft.

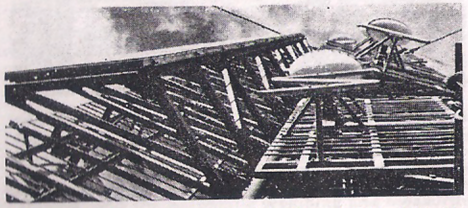
A second area of special competence is in mobile ground radar. In the last few years interest has turned from anti-aircraft radar to mortar location. The Green Archer, which EMI have sold throughout Europe, is a rugged and reliable radar built for rapid deployment and concealment in forward areas. A second generation equipment is under development and will have an outstanding export potential.

When the manoeuvres of aircraft forced defence to change from gunfire to guided missiles, EMI concentrated part of their attention on particular functions within these missiles. They make the proximity fuses for the majority of British weapons, and the telemetry units by which the parameters of the missile, in research, training and operation, are transmitted for information to the base.

The Royal Navy also uses much EMI equipment, both for radar and for acoustic reconnaissance. The sonar provided includes fixed installations in submarines, various plotting tables, and also a special type which can be towed behind a ship at a varying depth to overcome the trapping of sound below water layers of different temperature. For use in the same element for gathering information the EMI company in Canada also produce small sonobuoys and long-lived oceanographic buoys. Another device which has particular value for naval use is an ionospheric sounder which displays the best choice of frequency to use at any time for long-distance radio communication.

Alongside these defence projects is a wide range of commercial activities. These can be divided roughly into those which stem fairly directly from the pre-war entertainment interests of EMI, extended by more recent techniques, and those, mainly industrial control systems, which represent other exploitations of defence electronic and systems techniques.

EMI's initiative in high-definition television demanded unique research in vacuum electronics, particularly into camera tubes and photomultipliers, and into the design of cameras using them. Apart from these, new techniques called for new standards measurement, such as cathode ray oscilloscopes far in advance of earlier technique. In



View of the new transmission aerial for the Independent TV authorities, designed and constructed by EMI Electronics Ltd. The pods shown on the side of the tower are for ice protection.

OTHER ACTIVITIES OF EMI *(cont)*

An EMI colour TV camera, Type 2001.

all these EMI's position has been held. The most recent colour television camera, Type 2001, was ready when many decisions on providing public services in Britain had to be taken in the early spring of 1967, and for performance and ease of operation has swept the board, with export deliveries already made in Europe. Meanwhile, monochrome television is being keenly exploited in its closed-circuit form for industrial use, and also for educational aids: over 160 educational establishments of various types have now been supplied. Experience in installing television transmitters has led EMI to a near monopoly in the design of transmitting aerials tailored to the geographical needs of each service area, and avoiding interference in other countries.

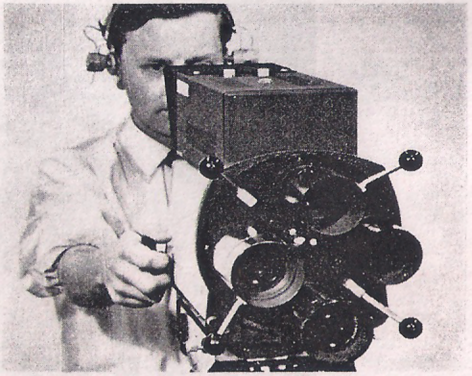
EMI Valve Division, apart from supplying EMI's own cameras with tubes, make camera tubes for maintenance and separate sale. Their photo-multipliers are exported around the world, and they are specially proud that one-third of their production of these devices goes to America. Microwave and UHF generators, up to very high power levels, are also among their products.

The successors to the special instruments developed for monitoring television research are now being marketed by the SEL subsidiary. EMI Electronics, however, have retained responsibility for a series of instruments for detecting, measuring and analysing nuclear contamination.

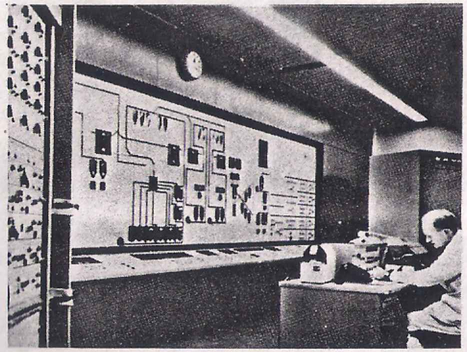
The long-standing and continuing interest of EMI in acoustics is reflected in the marketing of professional tape recorders by EMI Electronics, of instrumentation tape recorders by SEL, and of a variety of specialized components by Sound Products.

Independent Television news camera crews using an EMI L4 portable tape recorder with film sync facilities. The picture shows the L4 being used by the ITN crew covering Sir Francis Chichester's voyage round Cape Horn in Gipsy Moth IV.

Little space remains to describe the variety of EMI Electronics' industrial products, whether for the control of machine tools, of driverless tugs and stacker cranes for operating around a factory, or for sequencing production (e.g. selecting, measuring, mixing and processing the materials in a biscuit factory), or warehouse operations. It must suffice to mention one area of special interest, in which EMI have been working with the National Coal Board: the first intrinsically safe remotely operated long-walled face equipment (known as ROLF) made by us for the Coal Board is in process of installation and evaluation at a colliery in the South Yorkshire area.



Type BC.920 is a high resolution transistorized camera specially designed to meet the requirements of educational television.



The automatic control system for the Royal Verkade Manufacturing Company, one of Europe's leading biscuit makers for which EMI Electronics was the main contractor. This project controls bulk handling of flour, sugar and liquid ingredients of biscuit doughs, and the automatic weighing and measuring also of these materials during manufacture. On the left is the manual control panel and in the centre the mimic diagram. On the right is the electronic computer and in the foreground is the control desk.

A WORD ABOUT THE FUTURE

We are told that a book of this import should appropriately conclude with "a look to the future". So we shall look.

Probably the safest and most sensible prognosis on the world of tomorrow was made by Mort Sahl, an American comedian, when he stated, "The future lies ahead". Surely any comment beyond that is sheer conjecture!

Nevertheless, we are emboldened through nearly three-quarters of a century of record making to venture a word or two.

Regardless of what the years ahead may bring, of one thing we are sure—*music* will always be with us . . . as it has always been since the first rhythm-thumping of the Neanderthals. And just as surely *recorded* music will continue, be it on disc, tape, sonic beam . . . or through some new medium yet to be conceived.

Therefore, we report happily that those of us who are involved in recording music are in a business that will be around for generations to come. And, as prosperity and leisure time grow, music will become an increasing factor in supplying entertainment and cultural stimulation.

Just as surely the "one world of music" will become more cohesive and integrated, with major world markets merging into vast areas of similar tastes and inclinations . . . more closely knit by faster, cheaper travel and communications, common markets, and the growing inter-dependence of nations.

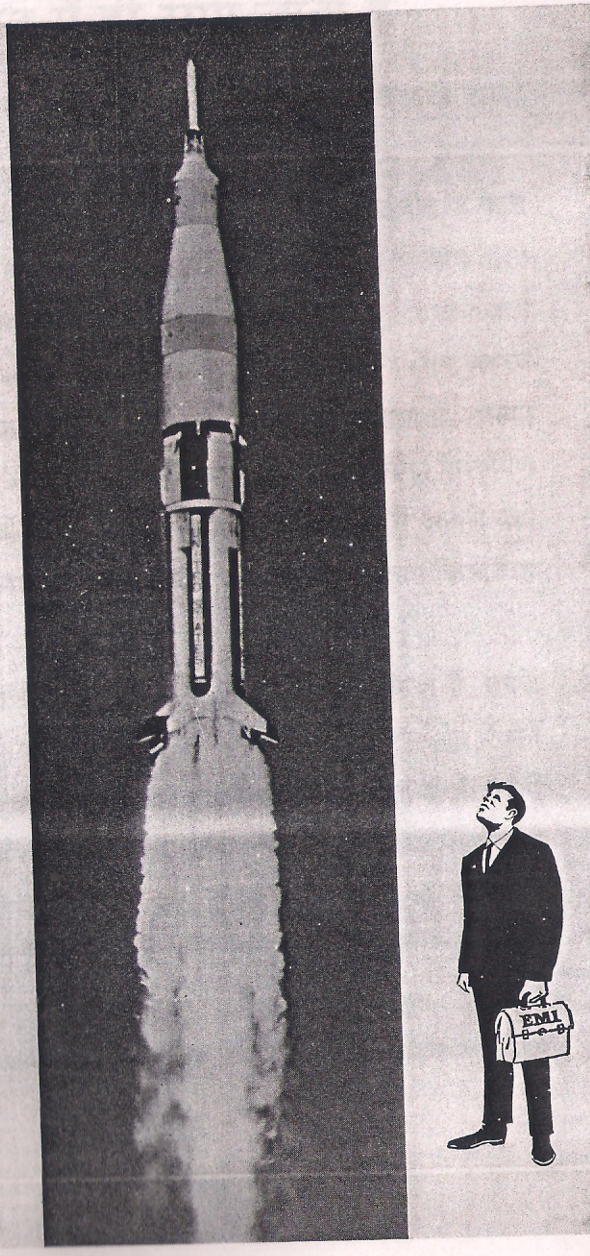
These huge markets of the future can best be served principally by large companies, with international holdings, branches, factories, men with global and multi-racial understanding.

All this would seem to lead readers safely to the ultimate conclusion that EMI, as the world's largest record company, should do rather well for a long time to come.

True. But we know, as do you, that men and machines were never a substitute for inherent *creativity.* One man—one musical idea—can explode into a world-wide force in the future, as in the past.

So may we close sincerely, and humbly. Bigness in itself is not and never has been enough . . . particularly in a business so dependent upon individuality and basic talent.

We, therefore, salute the songwriters of tomorrow . . . the composers, the conductors, singers and great musicians to come. Immortality will continue to be offered to the best of them, through the recordings of the future. Hopefully, from EMI !



Finally, EMI are forever seeking additional markets for their products. We have no doubt at all that when moon flights begin an EMI salesman will be hanging around the launching pad with the latest issues—just in case!